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SOCIAL-ECONOMIC PROFILE OF THE CASPER DISTRICT

Prepared for:

United States Department of the Interior
Bureau of Land Management
Casper District Office
Casper, Wyoming 82601

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INTRODUCTION

This Social-Economic Profile (SEP) of northeastern Wyoming was prepared for the U. S. Department of the Interior, Bureau of Land Management, Casper District Office, located in Casper, Wyoming. It was prepared by Harbridge House, Inc. under contract number YA-512-CT6-261 and in accordance with the Bureau of Land Management's SEP Manual (1606). According to that source, a social-economic profile is an information document used to gather, organize, and record sources of relevant data and to identify and analyze the social and economic issues, characteristics, problems, and major trends of the area being examined. The significance to national resource lands should be addressed.

The Social-Economic Profile Area (SEPA) described in this document consists of the ten counties which make up the Casper BLM District in northeastern Wyoming. These are Sheridan, Johnson, Campbell, Crook, Weston, Natrona, Converse, Niobrara, Platte, and Goshen Counties (see Exhibit I-1 following). The District is bordered by Nebraska and South Dakota to the East and Montana to the North. Colorado is nearby to the South. Generally speaking, these ten counties comprise a major geographic portion of the state and constitute an important economic resource of Wyoming based on the activities that occur there. Casper, the largest city in the SEPA, is also the major industrial and commercial trade center for the region and serves as a focal point for much of the energy-related development that is occurring in the area. Companies involved in energy development -- mining and production as well as related service companies -- are headquartered in Casper and the local economy reflects this strong industrial base. The specific energy development activities have been centered, most notably, around Gillette, Wyoming, in Campbell County to the North; while the effects of this activity have extended throughout the SEPA. Population and employment figures,

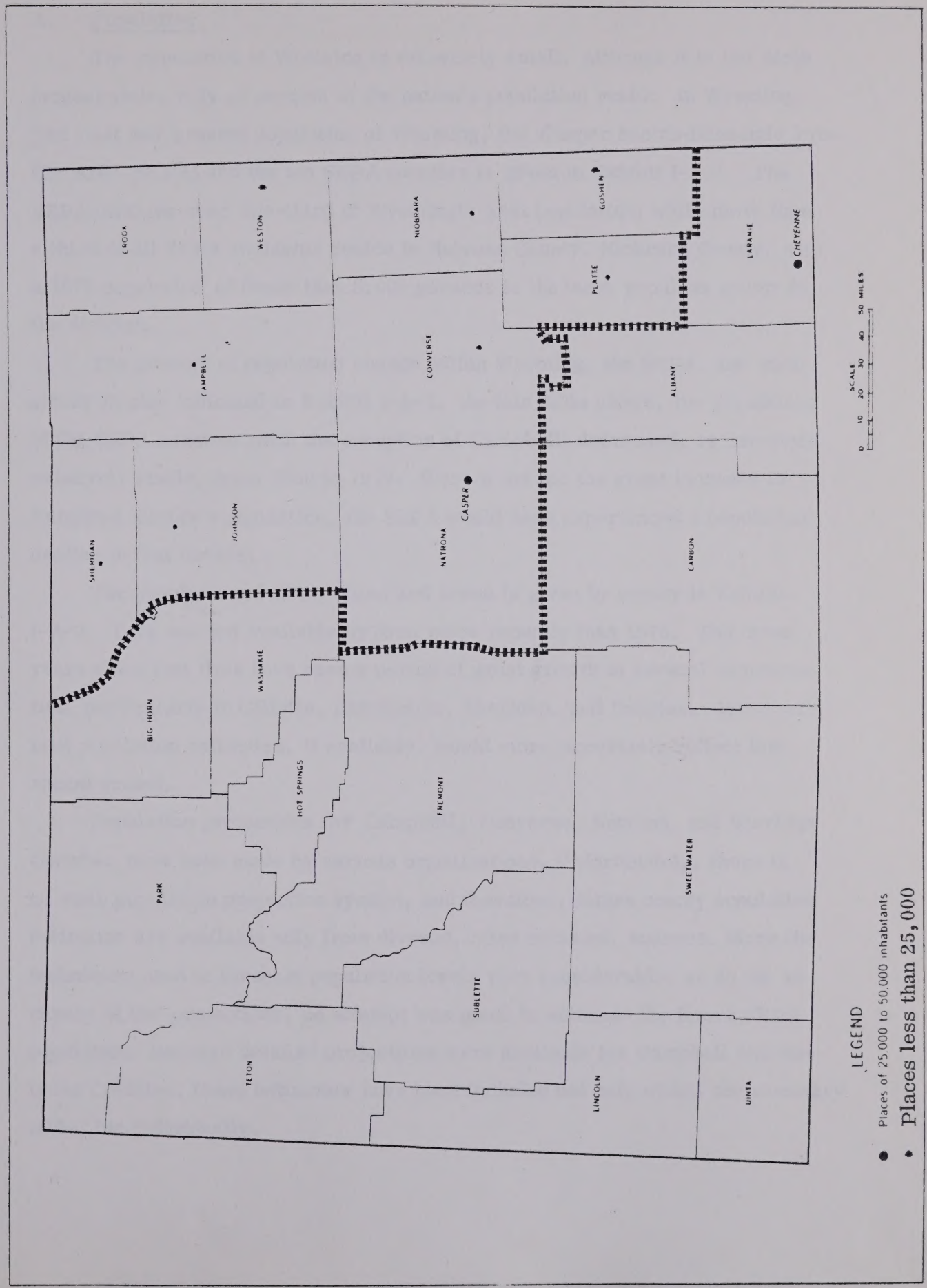
housing markets, income levels, and provision of public services and the local fiscal base have all been affected by the energy development activities in the region. Indications are that this activity will continue into the future.

This profile is based upon existing sources of data and information which have been assembled and analyzed. It is divided into two parts: Part I deals with the Social and Economic factors which make up the area; and Part II describes the Infrastructure elements which exist there. Each topic examined in this SEP is discussed separately within the framework of the report and is integrated to provide an orientation and descriptive profile of the SEP area as well as an evaluation of the current state of the data and findings presented. An annotated bibliography of all relevant sources of data and of persons or offices/agencies contacted in the course of preparation of the document is included as an appendix to this report. Normally, an SEP contains a section on Bureau relationships. However, in this document this was omitted from the contract and can be found elsewhere in the District's data base. There is, however, a discussion included of significant planning activities and contracts of which the Bureau's State and District offices should be aware.

This SEP report is intended as an easy reference document to be used in making subsequent planning and management decisions. It is an initial gathering of social and economic data, most efficiently handled on a substate regional scale, and in conjunction with the library of reference materials which is maintained in the BLM District Office. The SEP is used in the development of more specific Planning Area Analysis (PAA) documents intended for use in analyzing the SEP data on a smaller scale. Data from both the social-economic profile and the planning area analysis provide input into the management decisions and framework of the Bureau's State and District activities.

WYOMING EXHIBIT I-1

Counties and Selected Places



I. SOCIAL-ECONOMIC FACTORS

A. Population

The population of Wyoming is extremely small. Although it is the ninth largest state, only .2 percent of the nation's population reside in Wyoming. The past and present population of Wyoming, the Casper Social-Economic Profile Area (SEPA) and the ten SEPA counties is given in Exhibit I-A-1. The SEPA contains over one-third of Wyoming's total population; while more than a third of all SEPA residents reside in Natrona County. Niobrara County, with a 1975 population of fewer than 3,000 persons is the least populous county in the district.

The percent of population change within Wyoming, the SEPA, and each county is also indicated in Exhibit I-A-1. As this table shows, the population of the SEPA counties (with the exception of Campbell) decreased, or remained relatively stable, from 1960 to 1970. Were it not for the great increase in Campbell County's population, the SEPA would have experienced a population decline in that decade.

The population of SEPA cities and towns is given by county in Exhibit I-A-2. Data was not available by town more recently than 1973. The three years since that time have been a period of great growth in several communities, particularly in Gillette, Ranchester, Sheridan, and Douglas. More current population estimates, if available, would more accurately reflect this recent growth.

Population projections for Campbell, Converse, Natrona, and Sheridan Counties have been made by various organizations. Unfortunately, there is no state population projection system, and therefore, future county population estimates are available only from diverse, often outdated, sources. Since the techniques used to forecast population levels vary considerably, as do the accuracy of the projections, no attempt was made to estimate the future SEPA population. Because detailed projections were available for Campbell and Natrona Counties, these estimates have been included not only within the summary table, but individually.

Population projections for Gillette and Campbell County are shown in Exhibit I-A-3. These estimates predict a rapid population increase in the next five years, slowing to a near-average growth rate after 1980. The long-term growth of the county will depend upon the timing and extent of energy developments such as new coal mines and gasification plants. Substantial short-term population increases should occur with the construction of the Wyadak Power Plant and the 126-mile Burlington Northern Railroad track between Gillette and Douglas.[1]

Despite the steady depletion of oil and gas reserves, upon which the economy and growth of Natrona County and Casper has been based, the area should continue to grow, at least in the short run. Many people are expected to continue to live in Casper, but work elsewhere. If current estimates which indicate that increased mining activity may not compensate for the decreasing oil and gas production are correct, growth may not continue in the long run.[2] Population projections for the City of Casper and Natrona County are given from 1971 through 1994 in Exhibit I-A-4.

Converse County should also experience significant population growth as a result of the national demand for energy. Growth of the local coal, uranium, and petroleum industries are expected to generate population increases, summarized in Exhibit I-A-5. Douglas should experience a 98 percent population increase from 1970 to 1976, giving the city a population of 5300 persons. By 1981, the population of the city is projected to reach 16,038.[3]

Population projections for Crook, Goshen, Johnson, Niobrara, Platte, and Weston Counties (summarized in Exhibit I-A-5) were taken from 1973 Bureau of Reclamation estimates. These estimates do not adequately reflect possible population increases due to energy-related developments such as coal mines, gasification, and power generating plants. The possibility of oil shale conversion plants, currently remote although technologically feasible, has also been omitted from consideration. The Laramie River Station in

Platte County can be expected to have a positive impact on that area's population. Should energy-related development not occur in these counties, spillover from developments elsewhere may create an increase in population. More specific information is needed about the scope and rate of future developments in the Casper SEPA before current population projections for these counties can be made.

Although there was little in-migration to SEPA counties (with the exception of Campbell County) from 1960 to 1970, by 1975 only Weston and Niobrara Counties failed to gain in population. The state, as well as the Casper District, experienced a population growth well above the national average of approximately five percent. A major reason for the population growth since 1970 is the increased national demand for energy, particularly the low-sulfur coal underlying much of Wyoming. The Casper SEPA is rich in coal, oil, and natural gas. Of the ten counties, only Goshen, Niobrara, and Platte do not produce significant amounts of oil, gas, or coal. As a result of recent mining activities, the previous trend of out-migration (particularly of young people) has, in most counties, been reversed. Campbell, Converse, and Sheridan Counties have experienced great in-migration since 1970, as Exhibit I-A-6 shows.

The population increase within Sheridan County can be attributed not only to area coal production, but to the development of southern Montana's coal field. Much of southern Montana is comprised of Crow and Northern Cheyenne Indian Reservations. There are no major urban centers in the area; therefore, many miners choose to live in Sheridan County. Towns such as Ranchester, which has increased its population by 101.5 percent in the last six years, are experiencing growth without many of the tax benefits which would make such growth more manageable.[4]

The population of Campbell and Converse Counties has historically fluctuated with changes in energy demand. Campbell County, in particular, has recently felt the impacts of energy development. From 1960 to 1970, Campbell

County experienced a great population increase, while the state's population remained virtually stagnant. Large petroleum discoveries in the 1960s created an "oil boom" within the county. This "boom," the major factor in Campbell's population growth during the period from 1960 to 1970, reached a peak around 1966. However, since Campbell County contains roughly half of Wyoming's coal reserves (more coal than any other county in the nation) growth can be expected to continue.

The large size of Wyoming combined with its small population means that population density is very low. The United States averages about 60 persons per square mile, while Wyoming has a population density of fewer than four persons per square mile. The relatively high population density of Natrona and Sheridan Counties is due, in large part, to the urban areas of Casper and Sheridan. While the SEPA has a slightly higher population density than does the state as a whole, it remains very sparsely settled. The percentage and number of urban and rural residents of each county, the SEPA, Wyoming, and the United States is also given in Exhibit I-A-7.

The only available source for urban/rural distribution data was the 1970 Census. Since much growth has occurred recently in a few of the counties, these figures may not accurately reflect the current urban-rural mix.

Age distribution data for 1975 were available for only seven of the ten SEPA counties. These data are presented in Exhibit I-A-8. Of those counties for which data was available, only Campbell and Weston had a median population age significantly below that of the state. Sheridan County contained the highest percentage of persons over 50 years of age as well as the highest median population age. Age distribution data for 1970 are given in Exhibit I-A-9. As a comparison of the two Exhibits (I-A-8 and I-A-9) shows, from 1970 to 1975 the tendency has been toward a younger population in each county except Natrona and Campbell. The extremely low median age of Campbell County residents may be due in part to the influx of workers in the construction, oil, and coal industries, and their families since 1960. Once the in-migration stabilizes, the population median age should increase.

Ethnic groups comprise a very small proportion of Wyoming's total population, as is shown in Exhibit I-A-10. While 11 percent of the U. S. population is Black, Blacks comprise only .8 percent of the population of Wyoming, and only .4 percent of the SEPA. With the exception of Crook and Niobrara Counties, Spanish-surnamed residents are the largest minority group in each SEPA county, reflecting the state-wide distribution. None of the counties has a higher proportion of non-white residents than does the state as a whole. Goshen, with a relatively large Spanish population, has the highest non-white population percentage.

FOOTNOTES

1. R. K. Doran, "The Impact of Petroleum and Coal Development on Gillette, Wyoming". (Case Study #6) June 1974.

2. Roso, Anthony, Steve Bartenhagen, James Brock, "An Economic Base Study of the Casper Area," October 1976.

3. Converse Area Planning Office, "Population Projections for Converse County, and the Towns of Douglas and Glenrock," July 1976.

4. Sheridan Area Planning Agency, An Economics Study of Sheridan County, Wyoming, (Preliminary Draft), June 1976.

EXHIBIT I-A-1 Population of Casper SEPA by County

County	1960	1970	1975	Percent Change 1960-1970	Percent Change 1970-1975
Campbell	5,861	12,957	15,650*	121.1%	4.2%*
Converse	6,366	5,938	8,000	-6.7	34.7
Crook	4,691	4,535	4,900	-3.3	7.2
Goshen	11,941	10,885	11,700	-8.8	7.5
Johnson	5,475	5,587	5,600	2.0	0.3
Natrona	49,623	51,264	54,600	3.3	6.5
Niobrara	3,750	2,924	2,900	-22.0	-2.3
Platte	7,195	6,486	7,200	-9.9	10.3
Sheridan	18,989	17,852	19,900	-6.0	11.7
Weston	7,929	6,307	6,200	-20.5	-0.9
SEPA	121,820	124,735	136,650	2.4	7.1
Wyoming	330,066	332,416	374,000	0.7	12.5

Source: U.S. Department of Commerce, Bureau of the Census, 1970 Census of Population: Number of Inhabitants, PC (1) - A52. (Nov. 1970) and Population Estimates, Series P-26, No. 75-50 (July 1976).

*Campbell county 1975 population from: Gladstone Associates, Analysis of the Economic Base and Growth Potentials, 1976-1990. Prepared for: Department of Planning and Development, Gillette - Campbell County. (June, 1976).
Census estimates are lower, 12,600 for 1975, -2.4 percent increase from 1970 - 1975.

EXHIBIT I-A-2 Population of Cities and Towns

1960 - 1973

	1960	1970	1973	Percent Change 1960-1970	Percent Change 1970-1973
Campbell County					
Gillette	3,580	7,194	7,270	100.9%	1.1%
Converse County					
Douglas	2,822	2,677	3,104	-5.1	16.0
Glenrock	1,584	1,515	1,875	-4.4	23.8
Lost Springs	5	7	8	(NA)	(NA)
Crook County					
Hulett	335	318	327	-5.1	2.8
Moorcroft	826	981	1,019	18.8	3.9
Sundance	908	1,056	1,170	16.3	10.8
Goshen County					
Fort Larmie	233	197	210	-15.5	6.6
LaGrange	176	189	202	7.4	6.9
Lingle	437	446	465	2.1	4.3
Torrington	4,188	4,237	4,532	1.2	7.0
Yoder	83	101	107	(NA)	5.9
Johnson County					
Buffalo	2,907	3,394	3,359	16.8	-1.0
Kaycee	284	272	277	-4.2	1.8
Natrona County					
Casper	38,930	39,361	40,012	1.1	1.7
Edgerton	512	350	368	-31.6	5.1
Evansville	678	832	873	22.7	4.9
Mills	1,477	1,724	1,611	16.7	-6.6

EXHIBIT I-A-2 (cont'd)

Niobrara County	1960	1970	1973	Percent Change 1960-1970	Percent Change 1970-1973
Lusk	1,890	1,495	1,616	-20.9%	8.1%
Manville	124	92	97	-25.8	(NA)
Van Tassel	15	21	22	(NA)	(NA)
Platte County					
Chugwater	287	187	203	-34.8	8.6
Glendo	292	210	227	-28.1	8.1
Guernsey	800	793	855	-0.9	7.8
Hartville	177	246	265	39.0	7.7
Wheatland	2,350	2,498	2,736	6.3	9.5
Sheridan County					
Clearmont	154	141	152	-8.4	7.8
Dayton	333	396	427	18.9	7.8
Ranchester	235	208	312	-11.5	50.0
Sheridan	11,651	10,856	11,378	-6.8	4.8
Weston County					
Newcastle	4,345	3,432	3,283	-21.0	-4.3
Upton	1,224	997	971	-19.4	-1.6

(NA) Percent change not applicable for communities of 100 persons or less.

Source: U.S. Department of Commerce, Bureau of the Census, 1970 Census of Population: Number of Inhabitants - Wyoming, PC(1)-A52, Nov. 1970.

U.S. Department of Commerce, Bureau of the Census, Current Population Reports, "Population Estimates and Projections", Series P-25, No. 595. (April 1975).

EXHIBIT I-A-3

SUMMARY
HIGH-LOW POPULATION FORECASTS
GILLETTE AND CAMPBELL COUNTY, WYOMING
1976-1990

								Average Annual Change: 1976-1980		Average Annual Change: 1980-1990	
Low Forecast	1976	1977	1978	1979	1980	1985	1990	Amount	Percent	Amount	Percent
Gillette Urbanized Area[1/]	15,720	18,540	20,450	23,240	24,460	28,540	31,320	1,748	11.1%	686	2.8%
Campbell County	20,620	23,750	26,080	29,200	30,510	34,860	37,950	1,978	9.6%	744	2.4%
High Forecast											
Gillette Urbanized Area[1/]	15,720	18,540	21,500	24,100	28,660	42,730	43,540	2,588	16.5%	1,488	5.2%
Campbell County	20,620	23,750	27,040	30,610	36,490	54,020	54,700	3,174	15.4%	1,821	5.0%
Difference High-Low-Totals											
Amount	--	--	960	1,410	5,980	19,160	16,750	--	--	--	--
Percent	--	--	4.5%	5.8%	17.6%	55.0%	44.1%	--	--	--	--

1/ Gillette and Campbell County Planning Area.

Source: Gladstone Associates, Analysis of the Economic Base and Growth Potentials, 1976-1990.
Prepared for: Department of Planning and Development, Gillette-Campbell County. (June 1976).

EXHIBIT I-A-4

The City of Casper and Natrona County

POPULATION PROJECTIONS

YEAR	CASPER, WYOMING	NATRONA COUNTY
1971	40,578	52,801
1972	41,795	54,385
1973	43,048	56,016
1974	44,339	57,696
1975	45,669	59,426
1976	47,039	61,208
1977	48,450	63,044
1978	49,903	64,935
1979	51,400	66,883
1980	52,942	68,889
1981	54,530	70,995
1982	56,165	73,083
1983	57,849	75,275
1984	59,584	77,533
1985	61,371	79,858
1986	63,212	82,253
1987	65,108	84,720
1988	67,061	87,261
1989	69,072	89,878
1990	71,144	92,574
1991	73,278	95,351
1992	75,476	98,211
1993	77,740	101,157
1994	80,072	104,191

City-County Planning Office - June 1975

Source: Peterson, William, An Economic Analysis of Natrona County, Wyoming. Natrona County Planning Department. Western Interstate Commission for Higher Education. (1975)

EXHIBIT I-A-5

SEPA COUNTIES POPULATION PROJECTIONS, 1975-1990

County		1975	1980	1985	1990
Campbell	1, 5	20,620*	30,510	34,860	37,950
Converse	4	10,561*	23,958	(NA)	(NA)
Crook	4	5,168	5,800	5,500	5,200
Goshen	4	10,693	10,500	11,100	11,700
Johnson	2	7,294	9,000	11,100	13,200
Natrona	4	59,426	68,889	79,858	92,574
Niobrara	4	3,312	3,700	3,800	3,900
Platte	3	6,943*	7,400	7,325	7,250
Sheridan	4	20,800	23,088	26,263	29,874
Weston		5,504	4,700	4,600	4,500

*1976 Estimates

Sources:

1. Gladstone Associates, Analysis of the Economic Base and Growth Potential, 1976-1990. (June 1976).
2. Peterson, William, An Economic Analysis of Natrona County, Wyoming. (1975) data supplied by city-county planning office, 1975.
3. Sheridan Area Planning Agency, A Population Study of Sheridan County, Wyoming (Preliminary draft) (June 1976).
4. U. S. Department of the Interior, Bureau of Reclamation, Upper Missouri Region, Wyoming Population Estimates for Time Frames of 1980, 2000, 2020 (1973).
5. Converse Area Planning Office, "Population Projections for Converse County, and the Towns of Douglas and Glenrock." (July, 1976)

(NA)=Not Available.

EXHIBIT I-A-6

COMPONENTS OF POPULATION CHANGE 1970-1975

County	Total Change	Natural Increase (Births-Deaths)	Net Migration Number	Net Migration Percent*
Campbell	2,700	1,000	1,700	13.1%
Converse	2,100	200	1,900	31.3%
Crook	300	200	100	3.0%
Goshen	800	300	500	4.4%
Johnson	--	100	-100	-1.7%
Natrona	3,300	2,700	700	1.3%
Niobrara	-100	0	-100	-2.4%
Platte	700	100	600	8.8%
Sheridan	2,100	0	2,100	11.8%
Weston	-100	200	-300	-4.5%
SEPA	11,800	4,800	7,100	5.7%
Wyoming	42,000	17,000	25,000	7.4%

Sources:

U. S. Department of Commerce, Bureau of the Census, Current Population Reports, "Population Estimates," Series P-26, No. 75-50. July 1976.

* Gladstone Associates estimates, Analysis of the Economic Base and Growth Potentials 1976-1990. (June 1976)

** Percent Net Migration: Migrants as a percentage of total 1970 population.

EXHIBIT I-A-7

Urban - Rural and Population Density

County	1975 Land Area	1975 Pop. per Square Mile	1960 Urban Number	1960 Urban Percent	1960 Rural Number	1960 Rural Percent	1970 Urban Number	1970 Urban Percent	1970 Rural Number	1970 Rural Percent
Campbell	4,756	3.3	3,580	61.1%	2,281	38.9%	7,194	55.5%	5,763	45.5%
Converse	4,281	1.9	2,822	44.3	3,544	55.7	2,677	45.1	3,261	54.9
Crook	2,882	1.7	--	--	4,691	100.0	--	--	4,535	100.0
Goshen	2,228	5.2	4,188	35.1	7,753	64.9	4,237	38.9	2,193	39.3
Johnson	4,175	1.3	2,907	53.1	2,568	46.9	3,394	60.7	2,193	39.3
Natrona	5,342	10.2	38,930	78.4	10,693	21.5	39,361	76.8	11,903	23.2
Niabrara	2,614	1.1	--	--	3,750	100.0	--	--	2,924	100.0
Platte	2,086	3.4	--	--	7,195	100.0	--	--	6,486	100.0
Sheridan	2,532	7.9	11,651	61.4	7,338	38.6	10,856	60.8	6,996	39.2
Weston	2,407	2.6	4,345	54.8	3,584	45.2	3,432	54.4	2,875	45.6
SEPA	33,303	4.0	68,423	56.2	53,397	43.8	71,151	57.0	53,584	43.0
Wyoming	97,203	3.8	187,551	56.8	142,515	43.2	201,111	60.5	131,305	39.5
United States	3,615,122	59.8	125,269,000	69.9	54,054,000	30.1	149,325,000	73.5	53,887,000	26.5

Source: U.S. Department of Commerce, Bureau of the Census, 1970 Census of Population: Number of Inhabitants.

EXHIBIT I-A-8

Population of Selected Counties

by Age Group

1975

County	Median Age of Population	Percent of Population by Age Group				
		Under 18	18-24	25-34	35-49	50+
Campbell	24.9	37.5%	12.8%	15.4%	19.1%	15.2%
Converse	30.2	29.9	14.7	10.3	16.9	28.2
Goshen	30.4	29.7	14.6	10.7	15.1	29.9
Johnson	29.5	31.6	13.7	10.5	15.3	28.9
Natrona	27.0	32.7	14.8	12.9	17.5	22.1
Sheridan	34.5	26.3	14.1	10.1	15.1	34.4
Weston	25.9	34.1	14.9	10.6	16.5	23.9
Wyoming	27.8	32.5	13.9	13.0	16.4	24.2

Source: "Survey of Buying Power", Sales & Marketing Management. 117, 2 July 26, 1976.

EXHIBIT I-A-9

POPULATION OF SEPA COUNTIES BY AGE GROUP, 1970

County	Median Age	Under 18	18-24	25-34	35-49	50-64	65+
Campbell	23.4	5,322	1,524	2,093	2,232	1,170	616
		41.1%	11.8%	16.1%	17.2%	9.0%	4.7%
Converse	31.3	2,133	422	662	1,061	902	758
		35.9	7.1	11.1	17.9	15.2	12.8
Crook	27.5	1,736	385	528	772	724	390
		38.3	8.5	11.6	17.0	16.0	8.6
Goshen	31.8	3,724	971	1,086	1,804	1,862	1,438
		34.2	8.9	10.0	16.6	17.1	13.2
Johnson	31.6	1,925	442	621	958	917	724
		34.4	7.9	11.1	17.1	16.4	12.9
Natrona	26.3	19,094	5,740	6,165	9,927	6,516	3,822
		37.2	11.2	12.0	19.4	12.7	7.4
Niobrara	37.5	904	188	288	520	572	452
		30.9	6.4	9.8	17.8	19.6	15.4
Platte	33.3	2,167	460	739	1,037	1,191	892
		33.4	7.1	11.4	16.0	18.4	13.7
Sheridan	36.8	5,475	1,497	1,631	3,118	3,294	2,837
		30.7	8.4	9.1	1.75	18.4	15.9
Weston	27.4	2,478	509	707	1,165	856	592
		39.3	8.1	11.2	18.5	13.6	9.4

Source: U. S. Bureau of the Census, 1970 Census of Population: General Population Characteristics PC(1)-B52, Wyoming.

EXHIBIT I-A-10

Population of Casper SEPA

1974

By Sex and Race

County	Total	Male	Female	Minority		White		Negro		Indian		Oriental		Spanish		Other	
				Number	%	Number	%	Number	%	Number	%	Number	%	Number	%	Number	%
Campbell	11,900	6,160	5,740	375	3.1	11,790	96.9	--	-	90	.7	5	(N)	265	2.2	15	.1
Converse	7,100	3,550	3,550	180	2.5	7,035	97.5	--	-	35	.5	10	.1	115	1.6	20	.3
Crook	4,600	2,300	2,300	15	.3	4,585	99.7	--	-	15	.3	--	-	--	--	--	-
Goshen	11,400	5,640	5,760	920	7.5	11,315	92.5	10	.1	50	.4	15	.1	835	6.8	10	.1
Johnson	5,300	2,660	2,640	135	2.5	5,260	97.5	--	-	20	.4	5	.1	95	1.8	15	.3
Natrona	52,300	25,800	26,500	2,670	4.9	51,435	95.1	420	.8	225	.4	75	.1	1,805	3.3	145	.3
Niobrara	2,700	1,320	1,380	10	.4	2,690	99.6	--	-	10	.4	--	-	--	--	--	-
Platte	7,000	3,470	3,530	235	3.3	6,935	96.7	5	.1	10	.1	10	.1	170	2.4	40	.6
Sheridan	19,300	9,610	9,690	525	2.7	19,095	97.3	40	.2	85	.4	25	.1	320	1.6	55	.3
Weston	6,000	3,030	2,980	115	1.9	5,970	98.1	--	-	20	.3	5	.1	85	1.4	5	.1
SEPA	127,600	63,530	64,070	5,180	3.9	126,110	96.1	475	.4	560	.4	150	.1	3,690	2.8	305	.2
Wyoming	359,400	180,290	179,110	31,195	8.2	349,060	91.8	2,900	.8	5,395	1.4	1,215	.3	20,855	5.5	830	.2

(N) Less than .05%

Source: Employment Security Commission of Wyoming, Research and Analysis Section, Wyoming Area Manpower Review. (Spring 1976).

B. Income

Income has been used as a primary indicator of economic activity since World War II. National income accounts are a major measuring rod of economic growth, while per capita income is often taken as an indicator of social justice and well-being. Personal income is widely used as a criterion of economic welfare since it is a comprehensive measure of income received by individuals. It is not, however, an accurate indicator of economic activity per se because certain types of income which accrue in production, but are not received by individuals, are excluded, while other types of income which do not result from productive activity (i.e. rents, services, transfer payments) are included in the computation of personal income. It is important to note that personal income is a measure of income received by persons, while national (or state) income is money earned in the productive process.

The purpose of this section is to describe the income of SEPA residents. To do so, it is necessary to define some of the key concepts used in personal income analysis. Personal income is the money received by persons from all sources, including payments from government and business, but excluding transfers among persons. "Persons" are defined as individuals, owners of unincorporated enterprises, nonprofit institutions, private trust funds, and private health and welfare funds. Personal income is measured before personal taxes and is, therefore, an indicator of gross, rather than net, income. "Wage and salary disbursements" measure the monetary remuneration of employees, including executives' compensation, commissions, tips, bonuses and other payments to the worker. "Proprietors' income" is the aggregate net business earnings of owners of unincorporated enterprises, adjusted for changes in inventory valuation. Farmers, independent professional people and others who are considered self-employed are categorized as proprietors. Farm and non-farm proprietors' income is computed from all sources and production (not personal) expenses are deducted. Income by industry is money

received by persons from all sources (except proprietors' income, transfer payments, and dividends, rents and interest) broken down by industrial category. Private sources of industrial income exclude governmental wages and allotments.

The income data presented in Exhibits I-B-5 through I-B-14 is by place of work. Personal income by place of work is the sum of wages, salaries, other labor income and proprietors' income classified geographically by the place in which the money was earned, rather than by the residence of the worker. Income by place of residence is, of course, money received from the above sources computed on the basis of the area in which the worker resides.[1]

Changes in the source and amount of personal income within Wyoming and the Casper SEPA reflect the energy-related developments in the area. From 1969 to 1974, per capita personal income within Wyoming has increased at a much faster rate than within the United States as a whole (Exhibit I-B-1). Per capita income in the Rocky Mountain region has also shown rapid growth, again due, in part, to increasing energy demands.

Exhibit I-B-2 demonstrates the rapid increase of state and regional per capita income as a percent of national average income in the six-year period from 1969 to 1974. The fact that energy developments served to somewhat insulate the region, particularly Wyoming, from the effects of the national recession, was a factor in the area's relative income growth. As the table shows, there was a marked growth in per capita income from 1973 to 1974. Because 1974 data was taken from a different source than that for the 1969 through 1973 period, part of the increase may be due to different measuring procedures. Therefore, while the trend has been toward an increase in state and regional per capita income, the extent of the increase between 1973 and 1974 may not be quite as great as Exhibits I-B-1 and I-B-2 indicate.

The SEPA counties show a wide range of per capita income growth rates from 1969 to 1974, as Exhibit I-B-3 illustrates. Goshen County, with an increase of almost 75 percent in the six-year period has had the greatest growth in per capita income of any SEPA county. Much of the explanation for this growth rate lies in the fact that in 1969 Goshen had an extremely low per capita income level -- the lowest in the SEPA. The increase served to bring Goshen County more in line with the other counties, although per capita income in Goshen remains below the state and national averages.

The fact that Natrona County has the highest per capita income in the area is not surprising given the oil and gas-related activities which are centered in Casper. Many energy companies have headquarters in Casper, and highly paid oil workers often live in Casper and commute to the nearby oil fields. The concentration of an industry in which salaries and wages tend to be high within the Casper area of Natrona County accounts for that county's high per capita income -- higher than that within the state or the nation.

Current data on income distribution was, unfortunately, available for only 7 of the 10 SEPA counties. This information is presented in Exhibit I-B-4 and is given by household, rather than individual, income. Campbell County had the highest median household income of all areas included in the table. Since the 1974 per capita income of that county was only average for the SEPA, and was lower than the state, regional and national per capita income, the high median household income of Campbell County would indicate a large number of small familes (or single persons) at high income levels (over $15,000) and a relatively small number of very large families receiving low incomes. This explanation is borne out by Exhibit I-B-4. Slightly more than half (50.7 percent) of Campbell County households received over $15,000 annually. The national percentage of families in that category was 10 percent lower (40.7 percent), while only 39.3 percent of Wyoming households earned more than $15,000. At the other end of the spectrum, only 17 percent of

Campbell County households received less than $7,999 in 1975 while 29.8 percent of national and state families were in that income group.

The high per capita income of Natrona County is reflected in the income distribution and median household income within that county. Natrona averages fewer households in lower income groups, and more in higher groups than the state, region or nation. The largest group of Natrona County households fall into the $15,000 - 24,999 group, while within Wyoming, the Mountain Region and the U.S., the largest percentage of families receive under $7,999 annually. Converse and Weston Counties are about average in terms of income distribution and median household income, while Johnson, Sheridan and particularly Goshen counties have lower than average household incomes, and a large proportion of families in the lowest income group.

Personal income by major sources is given for 1974 as a percentage of total personal income in Exhibit I-B-5. These percentages were computed by Harbridge House as income from each source as a percentage of proprietors' income plus industrial (farm and non-farm) wages. The data presented in Exhibit I-B-5 is by place of work and, therefore, indicates only the relative importance of each sector to all income earned within each area, and not necessarily to the residents of the area.

One of the most striking facts to emerge from Exhibit I-B-5 is the relatively large proportion of income from mining earned within Wyoming, and especially in Campbell, Weston, Converse, Natrona and Johnson counties. Mining accounts for almost a third of the private industrial income of Campbell County (30.6 percent) and almost a quarter of private income within Weston County (24.1 percent). Nationally, and regionally, however, mining is a relatively insignificant income sector, accounting for only 1 and 3 percent (respectively) of total personal income. This underscores Wyoming's unique position as a major resource extracting state. While mining is an unusually important sector in the SEPA and within Wyoming, manufacturing accounts

for about 13 percent of total income in the Rocky Mountain region, yet Wyoming receives less than 6 percent of its income from manufacturing. The fact that manufacturing is the single largest source of personal income nationally but is not of primary importance in Wyoming is due to several factors. These include the fact that the state is located far from major markets, and the costs involved in transporting goods to the major east- and west-coast markets serves to deter national manufacturing firms from locating in Wyoming. Also, there is a lack of water for industrial use. Finally, the state has an unofficial policy of exporting coal from the state rather than using it in Wyoming.

The rapid growth of many SEPA counties is reflected in the large proportion of income derived from the construction sector. In Campbell, Converse, Crook, Johnson, Natrona and Sheridan counties, as well as within Wyoming, construction accounts for twice the proportion of total income as it does nationally. Those counties in which construction and mining are relatively small sources of income, Goshen, Niobrara, and Platte, are predominantly agricultural areas. Farming income (both proprietors' and farm-wage) accounts for 43.6 percent of personal income in Platte, and 55.1 percent in Goshen County. The largest income sources in Niobrara County are government, trade and agriculture.

As previously discussed, mining and construction constitute a major source of income in most SEPA counties. This dependency has increased markedly since 1973, as Exhibits I-B-6 through I-B-15 demonstrate. In most SEPA counties (Campbell, Converse, Crook, Johnson, Natrona, Niobrara, Sheridan and Weston) the most dramatic trend has been the abrupt decline, since 1973, of farming as a source of both proprietors' and wage income. Mining and construction, on the other hand, have increased substantially in that period. Mining income had decreased in most counties from 1969 to 1971, increased slowly to 1973, and then more sharply in 1974. Farm income in all SEPA counties also decreased in 1971, increased to 1973, and, with the exception only of Goshen and Platte (both of which experienced slight decreases) farm income dropped sharply in 1974.

Part of the explanation for the growth of mining activity may be that the area's oil fields have been steadily depleted, and it is increasingly expensive to continue oil extraction of smaller wells through secondary recovery techniques. Prior to the Arab oil embargo it was decreasingly profitable to extract Wyoming oil and such activity was, therefore, declining. However, given the higher price of oil in 1974, production has increased, generating more local income. In the short run the mining sector may continue to provide a large, and increasing, proportion of income to most SEPA counties. However, the supply of oil in the state is finite, and extraction has occurred for a long period of time. Large, easily recovered oil reserves are almost depleted, and exploitation of the remaining small wells and less accessible oil is expensive. Therefore, in the long run, petroleum extraction must decrease, and as it does so, the share of income provided by such activity will diminish. However, it is possible that increased coal, and possibly uranium mining may compensate somewhat for decreased oil production. Increased coal production in Campbell County, in particular, should provide much future income. Converse and Sheridan Counties may also benefit, although to a lesser extent than Campbell, from coal development. Increased bentonite extraction in Crook, Johnson and (to a lesser extent) Natrona Counties may also provide future income.

B. Income Footnotes

1. For a more detailed discussion of various income categories, and methodology, see W. LaMar Bollinger, Personal Income in Idaho Counties 1965-1972, Bureau of State Planning and Community Affairs (1975). For a more precise definition of terms see publications of the Bureau of Economic Analysis of the U.S. Department of Commerce and the Standard Industrial Classification Code.

EXHIBIT I-B-1

State, Region and United States

Per Capita Personal Income

	1969	1970	1971	1972	1973	1974	Percent Change 1969-1974
Wyoming	3,419	3,816	3,879	4,269	4,695	5,403	58.0%
Rocky Mountain Region*	3,289	3,587	3,845	4,200	4,670	5,127	55.9
United States	3,733	3,966	4,195	4,549	5,041	5,449	46.0

EXHIBIT I-B-2

Percent of U.S. Per Capita

	1969	1970	1971	1972	1973	1974
Wyoming	91.6	96.2	92.5	93.8	93.2	99.2
Rocky Mountain Region*	88.1	90.4	91.7	92.3	92.6	94.1

* Includes Colorado, Idaho, Montana, Utah and Wyoming

Source: Department of Commerce, Survey of Current Business. Vol. 54, No. 8. (August 1974) and Vol. 56, No. 4. (April 1976). (Data for 1974 was taken from the April 1976 issue, 1973 income figures differed between the issues (with the latter issue showing higher figures) we have shown those given in the earlier Survey for greater continuity.

EXHIBIT I-B-3

Per Capita Income

by County

County	1969	1970	1971	1972	1973	1974	Percent Increase from 1969-1974
Campbell	3,029	3,613	2,983	4,071	4,211	4,994	64.9%
Converse	3,568	3,873	4,162	4,563	4,568	4,614	29.3
Crook	2,901	3,609	3,246	3,611	4,311	4,134	42.5
Goshen	2,849	3,377	3,317	4,037	4,786	4,979	74.8
Johnson	3,354	3,973	3,739	4,477	4,963	5,233	56.0
Natrona	4,027	4,255	4,378	4,607	5,321	6,185	53.6
Niobrara	3,600	3,978	3,785	4,511	4,842	4,376	21.6
Platte	3,251	3,846	3,679	4,243	4,792	5,070	56.0
Sheridan	3,741	4,236	4,447	4,675	5,052	5,370	43.5
Weston	3,365	3,490	3,614	4,055	4,429	4,780	42.0

Source: U.S. Department of Commerce, Bureau of Economic Analysis, Local Area Personal Income 1969 - 1974, (June 1976).

EXHIBIT I-B-4

Effective Buying Income* (EBI) Distribution

For Selected Counties

1975

County	Median Household EBI	Percent of Households by EBI Group				
		Under 7,999	8,000-9,999	10,000-14,999	15,000-24,999	25,000+
Campbell	15,126	17.0%	8.0%	24.3%	36.8%	13.9%
Converse	12,705	31.0	8.2	20.5	32.9	7.4
Goshen	8,520	46.8	11.2	23.2	13.0	5.8
Johnson	10,804	36.8	9.0	18.7	23.0	12.5
Natrona	14,745	24.3	6.5	20.2	34.0	15.0
Sheridan	10,096	39.7	9.9	22.1	21.0	7.3
Weston	12,616	28.6	6.6	28.1	25.2	11.5
Wyoming	12,657	29.8	8.3	22.6	29.0	10.3
Mountain Region	11,997	31.4	9.0	23.2	26.8	9.5
United States	12,824	29.8	8.0	21.4	28.5	12.2

*Effective Buying Income: Personal Income less personal tax and non-tax payments (such as fines, fees, penalties); commonly called "disposable personal income." Compensation paid to military and diplomatic personnel stationed overseas is subtracted from disposable personal income to yield Effective Buying Income.

**Mountain Region includes Arizona, Colorado, Idaho, Montana, Nevada, New Mexico, Utah and Wyoming.

Source: "Survey of Buying," Sales & Marketing Management, Vol. 117, No. 2. July 26, 1976.

EXHIBIT I-B-5

PERSONAL INCOME BY MAJOR SOURCES AS A PERCENTAGE OF TOTAL* PERSONAL INCOME, 1974

	Campbell	Converse	Crook	Goshen	Johnson	Natrona	Niobrara	Platte	Sheridan	Weston	Wyoming	Rocky Mt. Region**	United States
Wage and Salary Disbursements	78.2%	75.7%	66.8%	34.3%	66.5%	77.8%	61.4%	44.2%	70.3%	76.1%	73.9%	70.5%	77.0%
Proprietor's Income	9.1	10.0	14.9	32.0	15.3	8.6	17.6	26.6	13.1	9.5	11.0	12.8	8.9
Farm	1.6	4.6	6.9	25.9	3.1	.1	5.2	20.5	3.1	1.8	4.1	6.5	2.9
Non-Farm	7.5	5.4	8.0	6.1	12.2	8.5	12.4	6.1	10.0	7.7	6.9	6.3	6.0
By Industry													
Farm	3.5	8.8	12.4	29.2	8.9	.6	12.5	23.1	5.6	3.8	5.9	7.6	3.4
Non-Farm	87.4	81.2	72.7	38.8	75.7	90.8	69.8	50.3	81.3	86.7	83.1	79.6	87.7
Private	80.8	67.6	51.5	27.8	57.0	78.5	50.0	37.5	57.5	69.7	64.2	61.0	71.7
Manufacturing	.9	.9	6.7	4.4	(D)	8.4	3.7	1.8	4.7	9.9	5.5	12.8	24.4
Mining	30.6	18.1	(D)	(L)	11.4	17.8	(D)	(D)	(D)	24.1	12.1	2.9	1.0
Construction	12.1	9.9	12.6	3.3	11.7	10.0	4.0	2.4	11.7	3.5	12.5	7.2	5.7
Wholesale & Retail Trade	15.4	9.6	7.4	9.8	12.9	17.5	18.8	10.1	15.9	10.5	12.4	14.8	15.0
Finance, Insurance & Real Estate	2.4	2.3	1.6	(D)	3.3	3.6	3.5	1.7	3.6	(D)	2.6	4.1	4.7
Trans. Comm. & Public Utilities	8.6	(D)	8.6	3.5	4.7	8.4	6.6	5.8	6.3	12.6	9.2	6.9	6.6
Services	10.0	(D)	(D)	3.9	8.5	12.6	6.3	(D)	12.1	6.1	9.5	11.9	14.0
Other	.6	(D)	.7	(D)	(D)	.2	(D)	(D)	(D)	(D)	.4	.3	.3
Government	7.1	13.6	21.2	10.7	18.7	12.3	19.9	12.8	23.8	17.0	18.9	16.0	16.0

* Total personal income computed as proprietor's income, plus Farm and NonFarm income.

** Rocky Mountain Region includes Colorado, Idaho, Montana, Utah, and Wyoming.

(D) Not shown to avoid disclosure of confidential information. Data included in totals.

(L) Less than $50,000. Data included in totals.

Sources:

County income computed from Exhibits I-B-6 through I-B-15.

Local Area Personal Income 1969-1974, State Regional and United States figures computed from data in Survey of Current Business, "State Personal Income, 1973-1974," Vol. 55, No. 8 (August 1975). U. S. Department of Commerce, Bureau of Economic Analysis.

EXHIBIT I-B-6

PERSONAL INCOME BY MAJOR SOURCES 1969-1974

(Thousands of Dollars)

CAMPBELL COUNTY

	1969	1970	1971	1972	1973	1974
TOTAL LABOR AND PROPRIETORS INCOME BY PLACE OF WORK 1/						
BY TYPE						
WAGE AND SALARY DISBURSEMENTS 2/	26,390	30,098	24,499	28,843	31,324	42,102
OTHER LABOR INCOME	1,070	1,201	1,223	1,395	1,554	1,913
PROPRIETORS INCOME	6,528	8,257	6,221	8,737	9,578	4,921
FARM	3,177	4,751	4,145	5,924	5,793	887
NONFARM	3,351	3,506	2,076	2,813	3,785	4,034
BY INDUSTRY						
FARM	3,866	5,482	4,903	6,710	6,658	1,870
NONFARM	30,122	34,074	27,040	32,265	35,798	47,066
PRIVATE 3/	27,894	31,660	24,311	29,287	32,424	43,513
MANUFACTURING	(D)	172	227	253	493	507
MINING	10,314	10,909	7,084	10,201	10,679	16,485
CONTRACT CONSTRUCTION	(D)	4,985	2,870	5,348	5,868	6,508
WHOLESALE AND RETAIL TRADE	6,043	6,501	6,133	5,973	6,754	8,325
FINANCE, INSURANCE, AND REAL ESTATE	584	(D)	(D)	(D)	1,014	1,311
TRANSP., COMM., & PUBLIC UTILITIES	3,342	4,171	3,363	2,886	3,300	4,656
SERVICES	3,429	4,095	3,773	3,560	4,032	5,414
OTHER INDUSTRIES	(D)	(D)	(D)	(D)	284	327
GOVERNMENT	2,228	2,414	2,729	2,978	3,374	3,553
FEDERAL, CIVILIAN	267	321	369	385	410	434
FEDERAL, MILITARY	253	254	359	319	339	349
STATE AND LOCAL	1,708	1,839	2,001	2,274	2,625	2,770
DERIVATION OF PERSONAL INCOME BY PLACE OF RESIDENCE						
TOTAL LABOR AND PROPRIETORS INCOME BY PLACE OF WORK	33,988	39,556	31,943	38,975	42,456	48,936
LESS: PERSONAL CONTRIBUTIONS FOR SOCIAL INSURANCE BY PLACE OF WORK	1,344	1,622	1,501	1,891	2,347	3,257
NET LABOR AND PROPRIETORS INCOME BY PLACE OF WORK	32,644	37,934	30,442	37,084	40,109	45,679
PLUS: RESIDENCE ADJUSTMENT	2,076	2,350	1,950	2,315	2,528	3,335
NET LABOR AND PROPRIETORS INCOME BY PLACE OF RESIDENCE	34,720	40,284	32,392	39,399	42,637	49,014
PLUS: DIVIDENDS, INTEREST, AND RENT	3,648	4,685	5,162	5,609	6,045	6,894
PLUS: TRANSFER PAYMENTS	1,655	2,071	2,544	2,621	2,971	3,302
PERSONAL INCOME BY PLACE OF RESIDENCE	40,023	47,040	40,098	47,629	51,653	59,210

SEE FOOTNOTES AT END OF TABLES.

Source: Local Area Personal Income 1969-1974 (Vol. 4: Western States) Department of Commerce, Bureau of Economic Analysis. PB 254 058 (June 1976).

EXHIBIT I-B-7

PERSONAL INCOME BY MAJOR SOURCES 1969-1974

(Thousands of Dollars)

CONVERSE COUNTY

	1969	1970	1971	1972	1973	1974
TOTAL LABOR AND PROPRIETORS INCOME BY PLACE OF WORK 1/						
BY TYPE						
WAGE AND SALARY DISBURSEMENTS 2/	10,791	11,192	16,488	18,081	17,720	22,336
OTHER LABOR INCOME	552	598	899	1,082	1,081	1,276
PROPRIETORS INCOME	4,808	6,076	4,973	6,047	6,690	2,948
FARM	2,985	4,212	3,699	4,925	5,199	1,383
NONFARM	1,823	1,864	1,274	1,122	1,491	1,585
BY INDUSTRY						
FARM	3,845	5,127	4,647	5,909	6,283	2,596
NONFARM	12,306	12,739	17,713	19,301	19,208	23,964
PRIVATE 3/	9,826	10,030	14,675	15,903	15,391	19,941
MANUFACTURING	161	98	89	(D)	126	270
MINING	1,254	1,479	2,019	2,290	3,403	5,358
CONTRACT CONSTRUCTION	2,299	1,836	5,156	4,569	1,959	2,913
WHOLESALE AND RETAIL TRADE	1,964	1,951	2,219	2,063	2,204	2,629
FINANCE, INSURANCE, AND REAL ESTATE	(D)	422	387	473	547	690
TRANSP., COMM. & PUBLIC UTILITIES	(D)	(D)	(D)	(D)	(D)	(D)
SERVICES	(D)	(D)	(D)	(D)	(D)	(D)
OTHER INDUSTRIES	(D)	(D)	(D)	(D)	(D)	(D)
GOVERNMENT	2,480	2,709	3,038	3,398	3,817	4,023
FEDERAL, CIVILIAN	383	450	494	510	548	580
FEDERAL, MILITARY	134	123	186	185	189	194
STATE AND LOCAL	1,963	2,136	2,358	2,703	3,080	3,249
DERIVATION OF PERSONAL INCOME BY PLACE OF RESIDENCE						
TOTAL LABOR AND PROPRIETORS INCOME BY PLACE OF WORK	16,151	17,866	22,360	25,210	25,491	26,560
LESS: PERSONAL CONTRIBUTIONS FOR SOCIAL INSURANCE BY PLACE OF WORK	593	663	1,025	1,149	1,254	1,656
NET LABOR AND PROPRIETORS INCOME BY PLACE OF WORK	15,558	17,203	21,335	24,061	24,237	24,904
PLUS: RESIDENCE ADJUSTMENT	-309	-359	-1,037	-1,143	-947	-1,253
NET LABOR AND PROPRIETORS INCOME BY PLACE OF RESIDENCE	15,249	16,844	20,298	22,919	23,290	23,651
PLUS: DIVIDENDS, INTEREST, AND RENT	3,840	4,161	4,851	5,037	5,128	5,836
PLUS: TRANSFER PAYMENTS	1,810	2,102	2,401	2,620	3,165	3,442
PERSONAL INCOME BY PLACE OF RESIDENCE	20,899	23,107	27,550	30,575	31,544	32,929

Source: Local Area Personal Income 1969-1974. op. cit.

EXHIBIT I-B-8

PERSONAL INCOME BY MAJOR SOURCES 1969-1974
(Thousands of Dollars)

CROOK COUNTY

	1969	1970	1971	1972	1973	1974
TOTAL LABOR AND PROPRIETORS INCOME BY PLACE OF WORK 1/						
BY TYPE						
WAGE AND SALARY DISBURSEMENTS 2/	6,658	6,657	6,380	6,672	8,086	9,934
OTHER LABOR INCOME	312	292	331	359	408	495
PROPRIETORS INCOME	3,374	5,720	3,676	5,117	5,874	2,217
FARM	2,245	4,852	2,802	4,175	4,759	1,032
NONFARM	1,129	1,088	874	942	1,115	1,185
BY INDUSTRY						
FARM	2,814	5,256	3,430	4,825	5,475	1,846
NONFARM	7,530	7,413	6,957	7,323	8,893	10,800
PRIVATE 3/	5,522	5,201	4,469	4,617	5,934	7,649
MANUFACTURING	822	780	749	779	1,077	1,003
MINING	1,263	(D)	(D)	(D)	(D)	(D)
CONTRACT CONSTRUCTION	771	772	377	440	881	1,867
WHOLESALE AND RETAIL TRADE	959	911	867	853	986	1,100
FINANCE, INSURANCE, AND REAL ESTATE	(D)	(D)	(D)	(D)	238	241
TRANSP., COMM. + PUBLIC UTILITIES	(D)	(D)	(D)	(D)	1,055	1,280
SERVICES	626	531	581	498	(D)	(D)
OTHER INDUSTRIES	(D)	92	92	94	104	111
GOVERNMENT	2,008	2,212	2,488	2,706	2,959	3,151
FEDERAL, CIVILIAN	480	564	652	613	685	755
FEDERAL, MILITARY	73	75	109	117	114	116
STATE AND LOCAL	1,455	1,573	1,727	1,976	2,160	2,280
DERIVATION OF PERSONAL INCOME BY PLACE OF RESIDENCE						
TOTAL LABOR AND PROPRIETORS INCOME BY PLACE OF WORK	10,344	12,669	10,387	12,148	14,368	12,646
LESS: PERSONAL CONTRIBUTIONS FOR SOCIAL INSURANCE BY PLACE OF WORK	354	377	375	395	525	681
NET LABOR AND PROPRIETORS INCOME BY PLACE OF WORK	9,990	12,292	10,012	11,753	13,843	11,965
PLUS: RESIDENCE ADJUSTMENT	138	349	258	388	292	365
NET LABOR AND PROPRIETORS INCOME BY PLACE OF RESIDENCE	10,128	12,641	10,270	12,141	14,135	12,330
PLUS: DIVIDENDS, INTEREST, AND RENT	1,984	2,585	2,953	3,220	3,933	4,481
PLUS: TRANSFER PAYMENTS	1,077	1,222	1,428	1,612	1,851	2,101
PERSONAL INCOME BY PLACE OF RESIDENCE	13,189	16,448	14,651	16,973	19,919	18,912

Source: Local Area Personal Income 1969-1974. op.cit.

EXHIBIT I-B-9

PERSONAL INCOME BY MAJOR SOURCES 1969-1974

(Thousands of Dollars)

GOSHEN COUNTY

	1969	1970	1971	1972	1973	1974
TOTAL LABOR AND PROPRIETORS INCOME BY PLACE OF WORK 1/						
BY TYPE						
WAGE AND SALARY DISBURSEMENTS 2/	13,181	14,040	15,332	16,837	19,479	21,369
OTHER LABOR INCOME	588	680	834	929	998	1,082
PROPRIETORS INCOME	8,970	13,104	10,094	15,948	20,933	19,909
FARM	5,721	9,613	7,205	13,038	17,375	16,139
NONFARM	3,249	3,491	2,889	2,910	3,558	3,770
BY INDUSTRY						
FARM	7,133	11,124	8,771	14,669	19,170	18,190
NONFARM	15,606	16,700	17,489	19,045	22,240	24,170
PRIVATE 3/	11,215	12,127	12,336	13,222	15,730	17,308
MANUFACTURING	1,731	1,897	1,854	2,209	2,764	2,733
MINING	(D)	(D)	(D)	(D)	(D)	(L)
CONTRACT CONSTRUCTION	645	770	1,131	1,353	1,834	2,047
WHOLESALE AND RETAIL TRADE	3,720	4,077	4,207	4,384	5,346	6,082
FINANCE, INSURANCE, AND REAL ESTATE	879	(D)	(D)	(D)	(D)	(D)
TRANSP., COMM., & PUBLIC UTILITIES	1,352	1,506	1,676	1,785	1,939	2,158
SERVICES	2,316	2,337	2,258	1,852	2,130	2,418
OTHER INDUSTRIES	(D)	(D)	(D)	(D)	(D)	(D)
GOVERNMENT	4,391	4,573	5,153	5,823	6,510	6,862
FEDERAL, CIVILIAN	856	724	830	877	940	999
FEDERAL, MILITARY	173	180	270	276	276	283
STATE AND LOCAL	3,362	3,669	4,053	4,670	5,294	5,580
DERIVATION OF PERSONAL INCOME BY PLACE OF RESIDENCE						
TOTAL LABOR AND PROPRIETORS INCOME BY PLACE OF WORK	22,739	27,824	26,260	33,714	41,410	42,360
LESS: PERSONAL CONTRIBUTIONS FOR SOCIAL INSURANCE BY PLACE OF WORK	786	891	955	1,069	1,326	1,507
NET LABOR AND PROPRIETORS INCOME BY PLACE OF WORK	21,953	26,933	25,305	32,645	40,084	40,853
PLUS: RESIDENCE ADJUSTMENT	572	766	913	961	1,075	1,079
NET LABOR AND PROPRIETORS INCOME BY PLACE OF RESIDENCE	22,525	27,699	26,218	33,606	41,159	41,932
PLUS: DIVIDENDS, INTEREST, AND RENT	4,795	5,508	6,173	6,258	7,250	8,279
PLUS: TRANSFER PAYMENTS	3,228	3,730	4,535	4,949	5,779	6,638
PERSONAL INCOME BY PLACE OF RESIDENCE	30,548	36,937	36,926	44,813	54,188	56,849

Source: Local Area Personal Income, 1969-1974. op.cit.

EXHIBIT I-B-10

PERSONAL INCOME BY MAJOR SOURCES 1969-1974

Johnson County

(Thousands of Dollars)

	1969	1970	1971	1972	1973	1974
TOTAL LABOR AND PROPRIETORS INCOME BY PLACE OF WORK 1/						
BY TYPE						
WAGE AND SALARY DISBURSEMENTS 2/	8,196	9,021	8,865	9,097	10,476	13,189
OTHER LABOR INCOME	302	357	398	424	457	562
PROPRIETORS INCOME	4,400	6,044	4,452	6,161	6,579	3,045
FARM	2,356	3,891	2,905	4,426	4,294	621
NONFARM	2,044	2,153	1,547	1,735	2,285	2,424
BY INDUSTRY						
FARM	3,161	4,747	3,792	5,345	5,306	1,773
NONFARM	9,737	10,675	9,923	10,337	12,206	15,023
PRIVATE 3/	7,301	8,009	7,048	7,171	8,733	11,305
MANUFACTURING	(D)	620	565	590	(D)	(D)
MINING	1,384	830	748	1,138	(D)	2,257
CONTRACT CONSTRUCTION	973	1,897	1,117	950	1,406	2,325
WHOLESALE AND RETAIL TRADE	2,168	2,305	2,216	2,088	2,187	2,558
FINANCE, INSURANCE, AND REAL ESTATE	356	(D)	484	(D)	545	652
TRANSP., COMM. + PUBLIC UTILITIES	522	567	676	724	876	931
SERVICES	1,175	1,321	1,242	1,026	1,417	1,881
OTHER INDUSTRIES	(D)	(D)	(L)	(D)	79	(D)
GOVERNMENT	2,436	2,666	2,875	3,166	3,473	3,718
FEDERAL, CIVILIAN	274	335	317	357	413	468
FEDERAL, MILITARY	89	93	138	134	133	137
STATE AND LOCAL	2,073	2,238	2,420	2,675	2,927	3,113
DERIVATION OF PERSONAL INCOME BY PLACE OF RESIDENCE						
TOTAL LABOR AND PROPRIETORS INCOME BY PLACE OF WORK	12,898	15,422	13,715	15,682	17,512	16,796
LESS: PERSONAL CONTRIBUTIONS FOR SOCIAL INSURANCE BY PLACE OF WORK	450	534	520	560	696	929
NET LABOR AND PROPRIETORS INCOME BY PLACE OF WORK	12,448	14,888	13,195	15,122	16,816	15,867
PLUS: RESIDENCE ADJUSTMENT	478	493	463	532	586	724
NET LABOR AND PROPRIETORS INCOME BY PLACE OF RESIDENCE	12,926	15,381	13,658	15,654	17,402	16,591
PLUS: DIVIDENDS, INTEREST, AND RENT	3,868	4,855	5,310	5,906	6,774	7,692
PLUS: TRANSFER PAYMENTS	1,753	2,067	2,410	2,617	3,072	3,568
PERSONAL INCOME BY PLACE OF RESIDENCE	18,547	22,303	21,378	24,177	27,248	27,851

Source: Local Area Personal Income 1969-1974, Department of Commerce, Bureau of Economic Analysis (June 1976).

EXHIBIT I-B-11

PERSONAL INCOME BY MAJOR SOURCES 1969-1974

Natrona County

(Thousands of Dollars)

	1969	1970	1971	1972	1973	1974
TOTAL LABOR AND PROPRIETORS INCOME BY PLACE OF WORK 1/						
BY TYPE						
WAGE AND SALARY DISBURSEMENTS 2/	138,191	143,356	151,735	161,704	183,490	221,198
OTHER LABOR INCOME	8,316	9,720	10,951	11,972	12,821	14,194
PROPRIETORS INCOME	23,470	24,615	16,468	19,405	24,937	24,389
FARM	1,194	1,738	1,348	2,288	2,038	187
NONFARM	22,276	22,877	15,120	17,117	22,899	24,202
BY INDUSTRY						
FARM	2,220	2,825	2,478	3,455	3,325	1,648
NONFARM	167,757	174,866	178,676	189,626	217,923	258,131
PRIVATE	144,169	149,253	148,949	159,187	184,762	223,176
MANUFACTURING	15,284	17,929	19,935	21,293	23,293	23,874
MINING	35,823	32,605	26,063	30,675	35,771	50,553
CONTRACT CONSTRUCTION	14,423	14,620	17,021	18,288	24,510	28,511
WHOLESALE AND RETAIL TRADE	29,968	31,826	34,172	35,812	40,688	49,798
FINANCE, INSURANCE, AND REAL ESTATE	8,378	8,263	8,636	9,192	8,811	10,301
TRANSP., COMM. + PUBLIC UTILITIES	15,041	16,513	16,917	18,406	21,406	23,751
SERVICES	24,987	27,258	25,894	25,077	29,881	35,911
OTHER INDUSTRIES	265	239	311	444	402	477
GOVERNMENT	23,588	25,613	27,727	30,439	33,161	34,955
FEDERAL, CIVILIAN	5,853	6,814	7,170	7,381	7,877	8,343
FEDERAL, MILITARY	859	872	1,283	1,333	1,299	1,327
STATE AND LOCAL	16,876	17,927	19,274	21,725	23,985	25,285
DERIVATION OF PERSONAL INCOME BY PLACE OF RESIDENCE						
TOTAL LABOR AND PROPRIETORS INCOME BY PLACE OF WORK	169,977	177,691	179,154	193,081	221,248	259,779
LESS: PERSONAL CONTRIBUTIONS FOR SOCIAL INSURANCE BY PLACE OF WORK	7,448	8,192	9,811	10,817	13,805	17,238
NET LABOR AND PROPRIETORS INCOME BY PLACE OF WORK	162,529	169,499	169,343	182,264	207,443	242,541
PLUS: RESIDENCE ADJUSTMENT	-2,540	-2,178	-140	111	339	-418
NET LABOR AND PROPRIETORS INCOME BY PLACE OF RESIDENCE	159,989	167,321	169,203	182,375	207,782	242,123
PLUS: DIVIDENDS, INTEREST, AND RENT	30,556	35,460	39,381	41,176	47,685	54,379
PLUS: TRANSFER PAYMENTS	13,958	16,385	18,877	20,172	23,105	26,952
PERSONAL INCOME BY PLACE OF RESIDENCE	204,503	219,166	227,461	243,723	278,572	323,454

Source: Local Area Personal Income 1969-1974, Department of Commerce, Bureau of Economic Analysis (June 1976).

EXHIBIT I-B-12

PERSONAL INCOME BY MAJOR SOURCES 1969-1974

Niobrara County

(Thousands of Dollars)

	1969	1970	1971	1972	1973	1974
TOTAL LABOR AND PROPRIETORS INCOME BY PLACE OF WORK 1/						
BY TYPE						
WAGE AND SALARY DISBURSEMENTS 2/	4,654	4,511	4,624	4,889	4,665	5,046
OTHER LABOR INCOME	191	210	252	273	252	275
PROPRIETORS INCOME	2,539	3,570	2,220	3,779	4,593	1,445
FARM	1,474	2,489	1,901	3,048	3,637	428
NONFARM	1,065	1,081	319	731	956	1,017
BY INDUSTRY						
FARM	1,894	2,933	2,363	3,526	4,163	1,028
NONFARM	5,490	5,358	4,733	5,415	5,347	5,738
PRIVATE 3/	4,382	4,159	3,427	3,996	3,800	4,105
MANUFACTURING	(D)	192	210	206	232	303
MINING	1,129	(D)	(D)	(D)	(D)	(D)
CONTRACT CONSTRUCTION	476	616	708	522	407	325
WHOLESALE AND RETAIL TRADE	1,188	1,258	1,420	1,597	1,372	1,541
FINANCE, INSURANCE, AND REAL ESTATE	225	229	262	267	290	284
TRANSP., COMM. + PUBLIC UTILITIES	416	416	432	479	473	539
SERVICES	707	682	676	466	489	520
OTHER INDUSTRIES	(D)	(D)	(D)	(D)	(D)	(D)
GOVERNMENT	1,108	1,199	1,306	1,419	1,547	1,633
FEDERAL, CIVILIAN	203	248	266	278	297	313
FEDERAL, MILITARY	46	49	71	72	71	73
STATE AND LOCAL	859	902	969	1,069	1,179	1,247
DERIVATION OF PERSONAL INCOME BY PLACE OF RESIDENCE						
TOTAL LABOR AND PROPRIETORS INCOME BY PLACE OF WORK	7,384	8,291	7,096	8,941	9,510	6,766
LESS: PERSONAL CONTRIBUTIONS FOR SOCIAL INSURANCE BY PLACE OF WORK	277	287	263	320	333	376
NET LABOR AND PROPRIETORS INCOME BY PLACE OF WORK	7,107	8,004	6,833	8,621	9,177	6,390
PLUS: RESIDENCE ADJUSTMENT	149	102	146	162	185	230
NET LABOR AND PROPRIETORS INCOME BY PLACE OF RESIDENCE	7,256	8,106	6,979	8,783	9,362	6,620
PLUS: DIVIDENDS, INTEREST, AND RENT	2,065	2,360	2,617	2,903	3,057	3,487
PLUS: TRANSFER PAYMENTS	1,075	1,221	1,414	1,397	1,604	1,827
PERSONAL INCOME BY PLACE OF RESIDENCE	10,396	11,687	11,010	13,083	14,023	11,934

Source: Local Area Personal Income 1969-1974, Department of Commerce, Bureau of Economic Analysis (June 1976).

EXHIBIT I-B-13

PERSONAL INCOME BY MAJOR SOURCES 1969-1974

Platte County

(Thousands of Dollars)

	1969	1970	1971	1972	1973	1974
TOTAL LABOR AND PROPRIETORS INCOME BY PLACE OF WORK 1/						
BY TYPE						
WAGE AND SALARY DISBURSEMENTS 2/	9,513	10,886	11,818	11,785	13,247	15,288
OTHER LABOR INCOME	546	616	640	668	759	892
PROPRIETORS INCOME	4,636	6,655	4,644	7,882	9,998	9,184
FARM	2,971	4,880	3,163	6,331	8,019	7,083
NONFARM	1,665	1,775	1,481	1,551	1,979	2,101
BY INDUSTRY						
FARM	3,609	5,560	3,869	7,061	8,824	7,999
NONFARM	11,086	12,597	13,233	13,274	15,180	17,365
PRIVATE 3/	8,428	9,681	9,986	9,682	11,074	12,957
MANUFACTURING	205	256	282	368	486	640
MINING	(D)	(D)	(D)	(D)	(D)	(D)
CONTRACT CONSTRUCTION	653	1,444	1,547	513	714	847
WHOLESALE AND RETAIL TRADE	2,210	2,332	2,460	2,568	2,993	3,500
FINANCE, INSURANCE, AND REAL ESTATE	356	398	426	482	542	584
TRANSP., COMM. & PUBLIC UTILITIES	1,394	1,494	1,559	1,631	1,814	2,021
SERVICES	(D)	(D)	(D)	(D)	(D)	(D)
OTHER INDUSTRIES	(D)	(D)	(D)	(D)	(D)	(D)
GOVERNMENT	2,658	2,916	3,247	3,592	4,106	4,408
FEDERAL, CIVILIAN	748	834	919	947	1,096	1,242
FEDERAL, MILITARY	103	107	163	164	167	170
STATE AND LOCAL	1,807	1,975	2,165	2,481	2,843	2,996
DERIVATION OF PERSONAL INCOME BY PLACE OF RESIDENCE						
TOTAL LABOR AND PROPRIETORS INCOME BY PLACE OF WORK	14,695	18,157	17,102	20,335	24,004	25,364
LESS: PERSONAL CONTRIBUTIONS FOR SOCIAL INSURANCE BY PLACE OF WORK	528	627	699	717	879	1,039
NET LABOR AND PROPRIETORS INCOME BY PLACE OF WORK	14,167	17,530	16,403	19,618	23,125	24,325
PLUS: RESIDENCE ADJUSTMENT	-222	-364	-345	-294	-345	-409
NET LABOR AND PROPRIETORS INCOME BY PLACE OF RESIDENCE	13,945	17,166	16,058	19,324	22,780	23,916
PLUS: DIVIDENDS, INTEREST, AND RENT	4,617	5,401	5,812	5,611	6,319	7,208
PLUS: TRANSFER PAYMENTS	2,178	2,496	2,852	3,067	3,693	4,282
PERSONAL INCOME BY PLACE OF RESIDENCE	20,740	25,063	24,722	28,002	32,792	35,406

Source: Local Area Personal Income 1969-1974, Department of Commerce, Bureau of Economic Analysis (June 1976).

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EXHIBIT I-B-14

PERSONAL INCOME BY MAJOR SOURCES 1969-1974

Sheridan County

(Thousands of Dollars)

	1969	1970	1971	1972	1973	1974
TOTAL LABOR AND PROPRIETORS INCOME BY PLACE OF WORK 1/						
BY TYPE						
WAGE AND SALARY DISBURSEMENTS 2/	32,685	35,705	38,125	39,818	44,499	50,519
OTHER LABOR INCOME	1,389	1,627	1,970	2,120	2,258	2,472
PROPRIETORS INCOME	9,415	11,439	8,911	9,564	12,458	9,415
FARM	2,674	4,977	3,152	4,165	5,648	2,210
NONFARM	6,741	6,462	5,759	5,399	6,810	7,205
BY INDUSTRY						
FARM	3,949	6,335	4,561	5,626	7,257	4,044
NONFARM	39,520	42,436	44,445	45,876	51,958	58,362
PRIVATE 3/	29,052	30,755	31,484	31,705	36,055	41,300
MANUFACTURING	2,584	2,756	2,987	3,013	3,369	3,345
MINING	1,065	(D)	(D)	(D)	1,136	(D)
CONTRACT CONSTRUCTION	5,405	5,331	5,106	4,876	6,094	8,435
WHOLESALE AND RETAIL TRADE	8,032	8,448	8,621	9,095	10,087	11,418
FINANCE, INSURANCE, AND REAL ESTATE	1,669	1,913	2,102	2,275	2,282	2,579
TRANSP., COMM. + PUBLIC UTILITIES	3,317	3,294	3,420	3,629	4,966	4,536
SERVICES	6,629	6,798	6,760	6,497	7,443	8,706
OTHER INDUSTRIES	351	(D)	(D)	(D)	678	(D)
GOVERNMENT	10,468	11,681	12,961	14,171	15,903	17,062
FEDERAL, CIVILIAN	4,751	5,455	5,987	6,644	6,937	7,604
FEDERAL, MILITARY	341	343	476	489	511	525
STATE AND LOCAL	5,376	5,883	6,498	7,438	8,455	8,933
DERIVATION OF PERSONAL INCOME BY PLACE OF RESIDENCE						
TOTAL LABOR AND PROPRIETORS INCOME BY PLACE OF WORK	43,469	48,771	49,006	51,502	59,215	62,406
LESS: PERSONAL CONTRIBUTIONS FOR SOCIAL INSURANCE BY PLACE OF WORK	1,916	2,208	2,520	2,646	3,162	3,701
NET LABOR AND PROPRIETORS INCOME BY PLACE OF WORK	41,553	46,563	46,486	48,856	56,053	58,705
PLUS: RESIDENCE ADJUSTMENT	613	676	659	724	811	1,009
NET LABOR AND PROPRIETORS INCOME BY PLACE OF RESIDENCE	42,166	47,239	47,145	49,580	56,864	59,714
PLUS: DIVIDENDS, INTEREST, AND RENT	16,290	19,579	22,090	23,931	25,189	28,541
PLUS: TRANSFER PAYMENTS	7,980	9,162	10,604	11,569	13,314	15,140
PERSONAL INCOME BY PLACE OF RESIDENCE	66,436	75,980	79,839	85,080	95,367	103,395

Source: Local Area Personal Income 1969-1974, Department of Commerce, Bureau of Economic Analysis (June 1976).

EXHIBIT I-B-15

PERSONAL INCOME BY MAJOR SOURCES 1969-1974

Weston County

(Thousands of Dollars)

TOTAL LABOR AND PROPRIETORS INCOME BY PLACE OF WORK 1/						
BY TYPE						
WAGE AND SALARY DISBURSEMENTS 2/	12,271	11,960	12,685	14,021	15,433	18,189
OTHER LABOR INCOME	733	795	901	1,011	1,065	1,157
PROPRIETORS INCOME	3,381	4,141	2,975	3,956	4,590	2,273
FARM	1,761	2,555	1,925	2,716	2,854	428
NONFARM	1,620	1,586	1,050	1,240	1,736	1,845
BY INDUSTRY						
FARM	2,090	2,906	2,290	3,094	3,271	902
NONFARM	14,295	13,990	14,271	15,894	17,817	20,717
PRIVATE 3/	11,681	11,147	11,180	12,458	13,980	16,665
MANUFACTURING	1,421	1,110	1,548	(D)	2,394	2,373
MINING	3,892	3,707	2,821	3,499	4,196	5,955
CONTRACT CONSTRUCTION	545	461	589	667	748	846
WHOLESALE AND RETAIL TRADE	1,973	2,096	2,070	2,144	2,158	2,502
FINANCE, INSURANCE, AND REAL ESTATE	394	(D)	(D)	(D)	(D)	(D)
TRANSP., COMM, + PUBLIC UTILITIES	2,035	1,974	2,381	2,416	2,748	3,018
SERVICES	1,421	1,393	1,327	1,297	1,287	1,447
OTHER INDUSTRIES	(L)	(D)	(D)	(D)	(D)	(D)
GOVERNMENT	2,614	2,843	3,091	3,436	3,837	4,052
FEDERAL, CIVILIAN	404	499	535	566	618	668
FEDERAL, MILITARY	101	104	149	151	151	154
STATE AND LOCAL	2,109	2,240	2,407	2,719	3,068	3,230
DERIVATION OF PERSONAL INCOME BY PLACE OF RESIDENCE						
TOTAL LABOR AND PROPRIETORS INCOME BY PLACE OF WORK	16,385	16,896	16,561	18,988	21,088	21,619
LESS: PERSONAL CONTRIBUTIONS FOR SOCIAL INSURANCE BY PLACE OF WORK	666	693	801	906	1,112	1,361
NET LABOR AND PROPRIETORS INCOME BY PLACE OF WORK	15,719	16,203	15,760	18,082	19,976	20,258
PLUS: RESIDENCE ADJUSTMENT	728	829	655	747	834	1,107
NET LABOR AND PROPRIETORS INCOME BY PLACE OF RESIDENCE	16,447	17,032	16,415	18,829	20,810	21,365
PLUS: DIVIDENDS, INTEREST, AND RENT	2,953	3,146	3,412	3,516	3,905	4,456
PLUS: TRANSFER PAYMENTS	1,581	1,939	2,284	2,388	2,639	3,044
PERSONAL INCOME BY PLACE OF RESIDENCE	20,981	22,117	22,111	24,733	27,354	28,865

1/ Equals the sum of wages, other labor income and proprietors' income.
2/ Primary source for private non-farm wages: ES-202 covered wages - State Employment Security Commissions
3/ (L) Less than $50,000. Data are included in totals.
(D) Not shown to avoid disclosure of confidential information. Data are included in totals.

Source: Local Area Personal Income 1969-1974, Department of Commerce, Bureau of Economic Analysis (June 1976).

C. Employment

Employment, like income, is an important indicator of economic well-being. Employment statistics are computed on the basis of labor force employment in various sectors. The labor force is defined by the Wyoming Employment Security Commission as those persons over 16 years of age who are either employed or are seeking and available for work. The unemployment rate is that proportion of the labor force which is unemployed and seeking work. Obviously, the unemployment rate does not provide a complete measure of unemployment since some persons may not have jobs, yet, for a variety of reasons, may not have registered with the state unemployment office. Many self-employed persons may fall into this category, as may people who are either unable to work, or have ceased to look for employment. Furthermore, underemployment -- less than full-time work -- is not reflected in unemployment statistics. The major employment sectors, farm and non-farm proprietors, wage and salary, private and government employment correspond to sectors described in I.B. Income, above. Industrial sectors such as manufacturing, mining, construction, etc. are all self-explanatory.

The economic base of Wyoming is unusual compared to that of the nation. More energy is produced than consumed in the state, and this fact is the key to Wyoming's recent rapid growth. Since Wyoming is an energy exporting state, mining employment is of far greater significance in the state than it is nationally. Mining employment in Wyoming is eleven times the national average (Exhibit I-C-1). The high rate of construction employment is also a result of recent growth in the state energy industry. With the exception of manufacturing, the remaining industrial sectors correspond to the national average in terms of percent of total employment, as Exhibit I-C-1 demonstrates.

Although the manufacturing sector is the most important national source of employment, it plays a relatively insignificant role in Wyoming's economy. This is primarily due to the sparse population, the great distances between metropolitan centers and markets, a scarcity of the raw materials used in

manufacturing, lack of industrial water, and the state's policy of exporting coal. Despite these problems, state officials attempted in the early 1960s to attract manufacturing concerns into the state in an attempt to halt out-migration.[1]

The increased national demand for oil, coal, and uranium triggered a growth in the state's labor force, as the resident population proved insufficient to meet the labor demands of the growing energy and construction industries. In the two-year period between 1974 and 1975 alone, employment in the mining industry grew at a rate of 19.1 percent (Exhibit I-C-2). Much of the large increase in state mining employment may be attributed to the recent increase in the price of petroleum. The higher price makes it profitable for companies to extract, and explore for, oil located in small or less easily accessible wells. Secondary recovery techniques are also utilized more often by companies since oil recovered by such methods is now profitable. Additionally, coal, uranium, trona, and bentonite extraction may substantially explain the large recent increase in state mining employment.

The large increase in mining activity in Wyoming may be largely responsible for the large increase in the state's labor force since 1970. In the five-year period between 1970 and 1975, the total state labor force increased 30 percent as shown in Exhibit I-C-3. The annual increase has averaged more than five percent. Although the labor force has been increasing, Wyoming's unemployment rate is extremely low. In 1974 and 1975, Wyoming had the lowest rate of unemployment of any state in the nation.

The rise in energy-related production in the state served somewhat to insulate Wyoming from the effects of the national recession. As Exhibit I-C-4 illustrates, the sharp increase in national unemployment from 1974 through 1975 barely affected Wyoming. As the national rate of unemployment climbed to 9.5 percent, Wyoming's unemployment rate stayed below five percent -- well within the "acceptable" rate of six percent unemployment.

As Exhibit I-C-5 demonstrates, employment sectors within the SEPA are not of equal importance to each county. It is difficult, therefore, to make generalizations about employment within the SEPA as a whole. For this reason, we will discuss employment for each county individually.

Mining is Campbell County's major employment sector, as shown in Exhibit I-C-5, accounting for 23.1 percent of the county's total employment. Government and trade also account for substantial employment, 21.8 and 20.2 percent, respectively. However, as demonstrated in Exhibit I-C-6, from 1970 to 1974, growth of employment in the mining and trade sectors has been relatively low, while government employment increased by 50 percent. Total employment in the county has increased by only 11 percent -- above the national increase, but low compared to the state employment growth of 21.4 percent in the same period.

The importance of oil and gas in the economy of Campbell County, particularly Gillette, is demonstrated in Exhibit I-C-7. Those industries employing the largest number of workers are all involved in oil-related activities. It is obvious from the above discussion that the economy of Campbell County is dependent upon the energy industry. There are large amounts of oil and gas in the region and this has been responsible for much of the area's past employment. Unfortunately, fields tend to be small and are rapidly depleted. With the higher price of oil and new secondary recovery methods, it is profitable to continue to extract oil from these fields. However, the reserves are finite and are rapidly becoming exhausted. Therefore, while oil and gas extraction is, and in the short run will be, a major source of employment for area residents, it cannot be expected to continue to provide employment in the long run.[2]

Since Campbell County has enormous reserves of coal, as do the other counties in the Powder River basin, coal-based energy developments are expected to provide a great deal of future employment. In fact, due to the large amounts of coal in the county, the next ten years are expected to be a

period of "boom" growth in Campbell County, particularly in Gillette. Between 1976 and 1990, annual employment growth in the area is expected to range between 9 and 16 percent. Since an annual increase of four or five percent is high, these estimates indicate the rapid increase projected for the area. The increase is not likely to be steady, rather, between 50 and 55 percent of the net employment increase should occur in the next five years. An additional 40 to 49 percent of the expected growth is forecasted for the following five years (1981 - 1985).

The reason for this projected rate of growth is the development of area energy resources -- either from strip mine operations or power plant construction. A substantial percentage (26 to 28 percent) of Campbell County's total employment by 1990 is projected to be in energy occupations. The activities of the six to ten energy companies which are currently developing energy projects or have plans to do so will have an enormous impact upon the county. This is particularly true given the area's dependence upon energy-related activities; a dependence which will, in all probability, increase.[3]

Although government, mining, and trade are responsible for most of the employment in Converse County, mining does not account for as large a proportion of total employment in Converse County as in Campbell County. The single largest employment sector in Converse County (Exhibit I-C-5) is the government, accounting for 21.3 percent of the county's total employment. However, while mining is not the area's largest source of employment, it has shown the fastest rate of increase (178 percent) from 1970 to 1974 (Exhibit I-C-8).

Converse County is rich in energy resources: oil, gas, coal, and uranium are abundant. The massive coal resources of the Powder River Basin (in which Converse County lies) are responsible for much employment in the area and can be expected to provide county residents with increased future employment. Oil and gas extraction play a significant role in the county's economy (see Exhibit I-C-9). As exploration in the southern Powder River Basin continues, the

importance of petroleum-related employment may increase. However, given the tendency of area oil fields to be small, perhaps the most stable source of future employment in the county will be uranium mining.[4]

Douglas in Converse County is a major area of current and planned uranium mining activity. Exxon's Highland Mill north of Douglas is operational and will employ approximately 400 workers when production capacity is reached. Rocky Mountain Energy Company has announced that construction of a large uranium complex adjacent to the Highland Mill will begin this year. When completed, this facility is expected to provide employment for about 250 workers.[5] The construction of additional railroad lines within the Powder River Basin, particularly the Burlington Northern rail line between Douglas and Gillette, are expected to generate a great deal of employment, both permanent and in the construction phase.

While Converse County may escape the "boom" predicted for Campbell County, growth will be rapid. If many planned and projected developments occur simultaneously, the area may indeed be exposed to the rapid population and employment increase associated with energy developments elsewhere.

Mining activities in Crook County currently account for a relatively small percentage of total employment. Although the amount of employment in the mining sector is not disclosed to protect the confidential nature of the data, services and mining combined provide 16.7 percent of total employment. If services provide the same percentage of employment in 1974 as in 1972 (seven percent) then mining would provide, at most, 10 percent of Crook County's total employment. While this is a much greater share of employment than mining accounts for nationally, it is about average for Wyoming. Employment sources in Crook County are given in Exhibit I-C-10.

The primary industries in Crook County (Exhibit I-C-11) are timber, oil exploration and services, and bentonite mining. Bentonite mining has been important in Crook and Weston Counties for many years. Demand for this mineral has been increasing and may provide future employment for area residents.

Exhibits I-C-12 and I-C-14 provide data on employment in Goshen and Johnson Counties. Exhibits I-C-13 and I-C-15 list the major industries in each county. Much of the future employment in Johnson county will depend upon coal developments in the Powder River Basin, both within the counties themselves and as spillover from developments in Campbell and Sheridan Counties.

Natrona County is dependent for much of its employment upon the oil and gas industry. As Exhibits I-C-16 and I-C-5 show, trade and services, much of which are oil-related, are the major employment sectors with mining and government also contributing significant employment.

Although the supply of oil and natural gas in Natrona County is becoming depleted, the area, particularly Casper, should not be adversely affected in the short run. Casper residents will have increasing employment in mining and mine services, although this increase may not, in the long run, compensate for the decrease in oil and gas related employment. Approximately half of Wyoming's mine service employees work in the Casper area. As mining increases within the state, the role of Casper as regional headquarters for mine services is also expected to increase. However, as the currently high construction costs within Sweetwater and Campbell Counties decrease, it may become more economical for companies to locate in these areas, near their operations, saving on transportation costs. Should this happen, Casper's regional service role will diminish.

Since Casper's economy is dependent upon energy resource extraction, the fact that those industries are, in the Casper area, on a declining production curve has adverse implications for the area's future growth.[6]

Niobrara was the only SEPA county in which employment declined from 1970 to 1974, as Exhibit I-C-17 indicates. This county is rural, and has suffered the problems associated with an agricultural economy -- an aging population due to out-migration of the young. The area's industries (Exhibit I-C-18) are manufacturing and agricultural in nature. Future employment growth will probably depend upon development of energy resources in surrounding counties.

Data on employment and industries in Platte County are given in Exhibits I-C-19 and I-C-20. The agriculture, forestry, and fishing industries had been the county's largest employers, but these have declined in importance in the past decade. Although data on mining employment is not disclosed, it has been significant in the area with iron ore and limestone mined near Guernsey and crushed marble near Wheatland.

The Missouri Basin Power Project plans to construct a coal-fired electrical generating plant northeast of Wheatland and a reservoir on the Laramie River. The construction will generate a great deal of short-term employment (estimates up to 2430 workers in 1979) and significant employment in the long run.[7]

The government, trade, and service industries are major employers in Sheridan County. Past employment data for Sheridan County is given in Exhibits I-C-21 and I-C-22. Proposed strip coal mines, coal conversion and gasification plants, and power generating facilities are expected to create a large demand for labor in the county. Since the resident labor supply will probably prove insufficient, workers are expected to migrate into the area. Therefore, total employment in the county and particularly in the City of Sheridan, should increase sharply in the near future.[8]

Mining is second only to government as a source of employment for Weston County residents. As shown in Exhibit I-C-5, mining accounts for almost 22 percent of total employment in the county. The fact that mining employment has increased by only 15 percent (Exhibit I-C-23 is due to

declining oil and gas production -- which accounts for most of the county's mining employment). Although production has decreased, exploration activity has more than doubled. If new drilling is successful, a future increase in oil production and employment will occur. Bentonite mining is a significant employment source in Weston. Projections indicate that bentonite production will double by 1980, creating increased area employment.[9]

The fact that the economy of Wyoming is unusually dependent upon the extraction and construction industries often creates problems of labor underutilization. This activity is outdoor work, and during severe winter weather, operations may be forced to slow down or cease for varying lengths of time.[10] Agricultural activity as well must often slow down during harsh weather. As Exhibit I-C-25 shows, the unemployment rate tends to decrease during the summer (June) and to increase in varying degrees in the winter. Since mining operations as well as construction continue year-round, it is only during particularly harsh weather that such employment decreases substantially. Therefore, much of the variation may be due to specific weather conditions, annual trends unrelated to weather, or agricultural slowdowns during the winter. This is borne out by Exhibits I-C-26 through I-C-34, which give the seasonal labor force distribution, by source, for each SEPA county.

The most striking seasonal trend to emerge from the information contained in Exhibits I-C-26 through I-C-34 is the fluctuation in agricultural employment. Since agriculture is traditionally a primarily warm-weather activity, particularly in terms of wage/labor, this trend is hardly surprising.

FOOTNOTES, Employment

1. Wyoming Employment Security Commission, Research and Analysis Section, Wyoming Area Manpower Review (Spring 1976).

2. Wyoming Industrial Development Corporation, Economic Blueprint Component of Public Investment Plan (1975).

3. Gladstone Associates. Analysis of the Economic Base and Growth Potentials, 1976-1990. Prepared for Department of Planning and Development, Gillette-Campbell County (June 1976).

4. Economic Blueprint, op.cit.

5. Wyoming Area Manpower Review, op.cit.

6. Roso, Bartenhagen and Brock, "An Economic Base Study of the Casper Area." Departmentof Economic Planning and Development (Oct. 1976).

7. The Division of Business and Economic Research, University of Wyoming, The Socioeconomic Impact of the Proposed Laramie River Station. (August 1975).

8. Sheridan Area Planning Agency, An Economic Base Study of Sheridan County, Wyoming (1976). (Preliminary draft)

9. Mineral Division of the State Department of Economic Planning and Development, 1975 Wyoming Mineral Yearbook (Feb. 1976).

10. Wyoming Area Manpower Review, op.cit.

Exhibit I-C-1 Percentage of Employment by Industry, 1975

Industry	Wyoming	United States
Agriculture	9%	7%
Manufacturing	5	24
Mining	11	1
Construction	9	4
Trans. & Util.	8	6
Trade	19	20
Finance	3	5
Services	14	16
Government	22	17

Exhibit I-C-2 Wyoming Non-Agricultural Employment by Industry, 1974-1975

Industry	Ann. Avg. 1974	Ann. Avg. 1975	Percent Change
Total Non-Ag.	137,100	147,300	7.4
Mfg.	8,300	8,500	2.4
Total Non-Mfg.	128,800	138,800	7.8
Mining	15,700	18,700	19.1
Construction	14,400	14,800	2.8
Trans. & Util.	12,000	12,700	5.8
Trade	29,500	31,700	7.5
Finance	4,300	4,700	9.3
Services	20,900	22,600	8.1
Government	32,000	33,600	5.0
Federal	6,400	6,500	1.6
St. & Local	25,600	27,100	5.9

Source:
Employment Security Commission of Wyoming, Research and Analysis Section, Wyoming Area Manpower Review (Spring 1976).

EXHIBIT I-C-3

WYOMING AVERAGE CALENDAR
YEAR LABOR FORCE & COMPONENTS

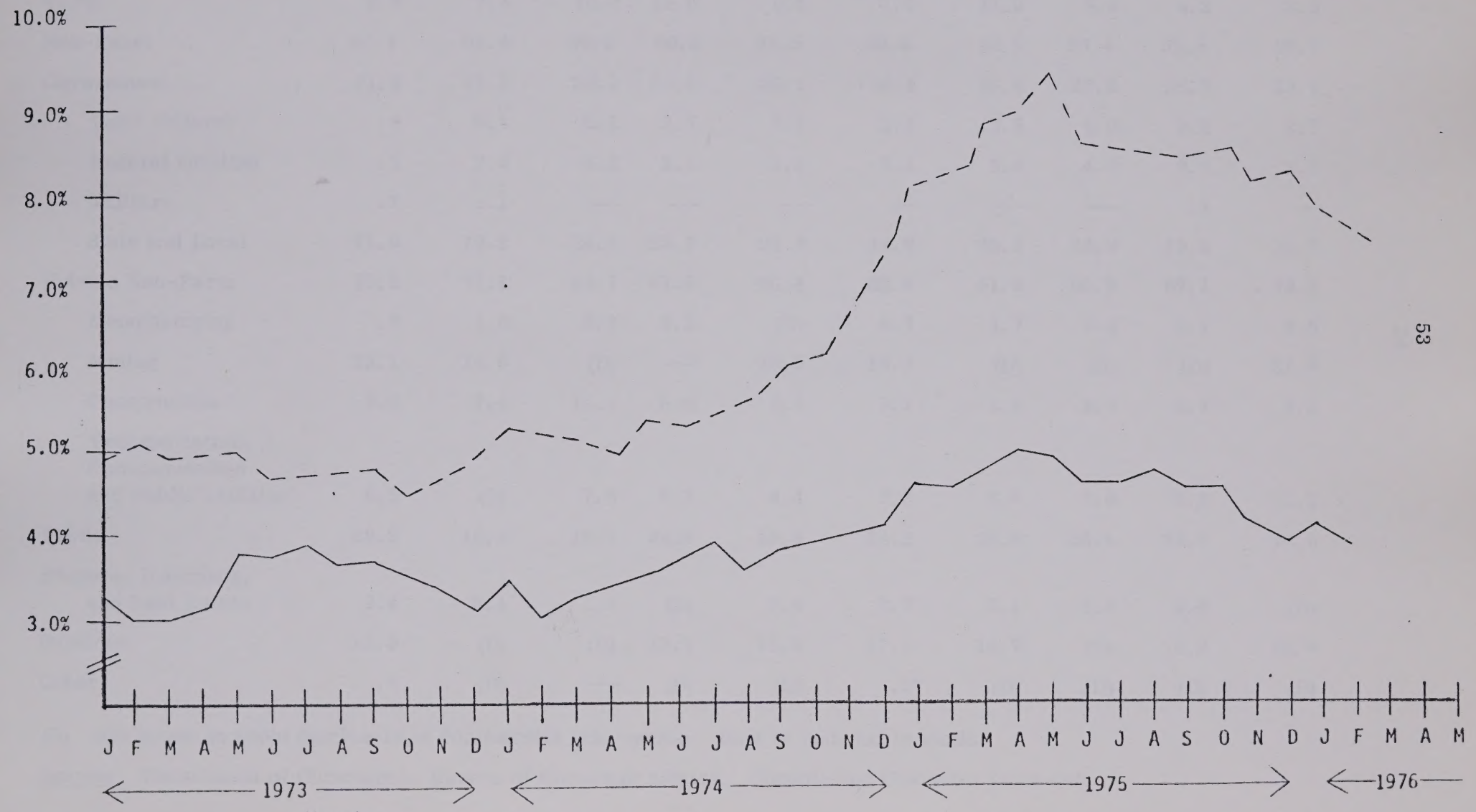
	1970	1971	1972	1973	1974	1975
Total Civilian Labor Force	137,950	141,550	148,570	156,390	167,430	179,470
% increase	---	2.6	5.0	5.3	7.1	7.2
Total Employment	131,810	135,110	142,630	150,930	161,500	171,590
Total Unemployment	6,140	6,440	5,940	5,460	5,930	7,880
Average Unemployment Rate	4.5%	4.6%	4.0%	3.5%	3.6%	4.4%

Source: Employment Security Commission of Wyoming, Research and Analysis Section, Wyoming Area Manpower Review (Spring 1976).

EXHIBIT I-C-4

Wyoming and United States

Total Unemployment Rate (Seasonally Adjusted)



Source: Employment Security Commission of Wyoming, Research and Analysis Section, Wyoming Area Manpower Review, (Spring 1976).

EXHIBIT I-C-5

Percent of Total Wage and Salary Employment

1974

	Campbell	Converse	Crook	Goshen	Johnson	Natrona	Niobrara	Platte	Sheridan	Weston
Farm	2.9	7.6	10.0	10.0	9.5	1.0	11.5	6.6	4.2	3.3
Non-Farm	97.1	92.4	90.0	90.0	90.5	99.0	88.5	93.4	95.8	96.7
Government	21.8	21.3	30.3	28.4	25.1	16.4	26.6	27.5	28.7	23.4
Total Federal	.8	2.1	5.5	2.7	2.2	2.4	2.6	4.6	9.2	2.7
Federal Civilian	.7	2.0	5.5	2.7	2.2	2.4	2.6	4.6	9.1	2.7
Military	.1	.1	---	---	---	---	---	---	.1	---
State and Local	21.0	19.2	24.8	25.7	22.9	14.0	23.9	22.9	19.5	20.7
Private Non-Farm	75.2	71.1	59.7	61.6	65.4	82.6	61.9	65.9	67.1	73.2
Manufacturing	.9	1.6	9.3	9.3	(D)	6.7	4.7	3.3	5.1	8.5
Mining	23.1	16.6	(D)	---	10.5	16.4	(D)	(D)	(D)	21.9
Construction	9.8	7.4	11.6	5.0	9.0	7.1	2.6	3.4	9.7	2.5
Transportation, Communication and Public Utilities	6.5	(D)	7.6	5.7	4.4	7.2	4.6	7.6	5.3	11.2
Trade	20.2	16.9	12.7	22.8	18.3	24.2	25.6	23.1	23.0	16.0
Finance, Insurance, and Real Estate	2.4	3.1	1.8	(D)	3.0	3.7	3.1	2.8	3.4	(D)
Services	11.9	(D)	(D)	13.7	15.2	17.1	14.7	(D)	18.3	10.8
Other	.4	(D)	---	(D)	(D)	.27	(D)	(D)	(D)	(D)

(D) Not shown to avoid disclosure of confidential information. Data is included in totals.

Source: Department of Commerce, Bureau of Economic Affairs. Unpublished Computer print-out.

EXHIBIT I-C-6

Employment by Type and Broad Industrial Sources

Campbell County

	1970	1971	1972	1973	1974	Percent Change 1970-1974
Total Employment	5,706	5,197	5,549	5,826	6,341	11%
Number of Proprietors	1,012	1,019	1,037	1,031	1,033	2
Farm	476	465	455	455	455	- 4
Non-Farm	536	554	577	576	578	8
Wage and Salary Employment	4,695	4,178	4,512	4,795	5,308	13
Farm	157	156	157	156	156	- 1
Non-Farm	4,537	4,022	4,355	4,639	5,152	14
Government	772	914	1,007	1,224	1,160	50
Total Federal	47	49	46	43	44	- 6
Federal Civilian	42	45	43	39	40	- 5
Military	5	4	3	4	4	-20
State and Local	725	865	961	1,181	1,116	54
Private Non-Farm	3,765	3,108	3,348	3,415	3,992	6
Manufacturing	27	33	33	52	46	70
Mining	1,108	840	974	962	1,224	10
Construction	473	284	536	510	520	10
Trans., Comm., and Public Utilities	457	357	283	343	343	-25
Trade	1,061	956	893	1,075	1,075	1
Finance, Insurance and Real Estate	(D)	(D)	(D)	106	127	(D)
Services	542	537	502	522	634	17
Other	(D)	(D)	(D)	21	23	(D)

Source: Dept. of Commerce, Bureau of Economic Analysis, Regional Analysis Division. Unpublished Computor print-out.

(D) Not shown to avoid disclosure of confidential information. Data included in totals.

Industries in Gillette

Campbell County

EXHIBIT I-C-7

Major Firm	Products & Services	Market Area	Employees
Amax Coal	Coal	National	83
Atlantic Richfield	Oil	National	28
Bank Enterprises Inc.	Drilling mud	Wyoming & adjoining states	22
Dowell Division of the Dow Chemical Company	Oil and gas field services	Wyoming	31
Exeter Drilling Company	Drilling oil and gas wells	Wyoming	65
Farmers Co-op Rolling Mill	Cattle and sheep range feed	Wyoming & adjoining states	40
Wyodak Resources Development Corp.	Coal	Wyoming	30
Flint Engineering & Construction Co.	Oil and gas field services	Wyoming	50-99
Pool Company	Gas and oil field services	Wyoming	21
Getter Trucking Inc.	Oil and gas field services	Wyoming	50-99
Halliburton Services	Oil and gas field services	Wyoming	50-99
Morrison-Knudsen Company, Inc.	Oil and gas field services	Wyoming	50-99

Source: Wyoming Industrial Development Corporation, Economic Blueprint Component of Public Investment Plan, (1975).

EXHIBIT I-C-8

Employment by Type and Broad Industrial Sources

Converse County

	1970	1971	1972	1973	1974	% Δ 1970-74
Total Employment	2,544	2,954	3,020	2,988	3,258	28%
Total Number of Proprietors	656	660	674	669	670	2
Farm	311	304	302	298	298	- 4
Non-Farm	345	356	372	371	372	8
Wage and Salary Employment	1,888	2,294	2,346	2,319	2,588	37
Farm	198	197	198	198	198	---
Non-Farm	1,690	2,097	2,148	2,121	2,390	41
Government	491	508	498	576	551	12
Total Federal	56	59	55	52	53	- 5
Federal Civilian	53	56	53	50	51	- 4
Military	3	3	2	2	2	- 33
State and Local	435	449	443	524	498	14
Private Non-Farm	1,199	1,589	1,650	1,545	1,839	53
]						
Manufacturing	19	18	(D)	20	40	111
Mining	155	230	246	305	431	178
Construction	177	401	346	144	191	8
Trans., Comm., and Public Utilities	(D)	(D)	(D)	(D)	(D)	(D)
Trade	338	367	353	365	438	30
Finance, Insurance and Real Estate	55	54	61	77	81	47
Services	(D)	(D)	(D)	(D)	(D)	(D)
Other	(D)	(D)	(D)	(D)	(D)	(D)

Source: Department of Commerce, Bureau of Economic Analysis, Regional Analysis Division. Unpublished Computer printout.

(D) Not shown to avoid disclosure of confidential information. Data included in totals.

EXHIBIT I-C-9

Converse County

Industries in Douglas

Major Firm	Products & Services	Market Area	Employees
Eagle Engineering Co. Inc.	Concrete and sand and gravel	Wyoming	9-24
Stacy Drilling Co.	Oil and gas field exploration	National	17
Stinson Sawmill	Rough and finished lumber by-product: mill residue	National	8
Russell Lumber & Post Plant	Lumber and posts	Wyoming & adjoining states	17

Industries in Glenrock

Major Firm	Products & Services	Market Area	Employees
Dave Johnston Coal Mine	Coal	Wyoming	50-99
John Jourgensen Paint Company	Traffic marking paint and industrial coatings	National	5
V-1 Oil Company	Natural gas liquids	Wyoming and adjoining states	9-24
Pronghorn Drilling	Metal mining services	Wyoming	5
Singwell Servicing Company	Oilfield services	Wyoming	17

Source: Wyoming Industrial Development Corporation, Economic Blueprint Component of Public Investment Plan, (1975).

EXHIBIT I-C-10

Employment by Type and Broad Industrial Sources

Crook County

	1970	1971	1972	1973	1974	% Δ 1970-74
Total Employment	1,949	1,868	1,858	1,991	2,081	7%
Total Number of Proprietors	782	780	786	779	780	---
Farm	508	497	491	485	485	- 5
Non-Farm	274	283	295	294	295	8
Wage and Salary Employment	1,167	1,088	1,072	1,212	1,301	11
Farm	130	130	130	130	130	---
Non-Farm	1,037	958	942	1,082	1,171	13
Government	367	376	366	404	394	7
Total Federal	73	71	65	65	71	- 3
Federal Civilian	73	71	65	65	71	- 3
Military	--	--	--	--	--	---
State and Local	294	305	301	339	323	10
Private Non-Farm	670	582	576	678	777	16
Manufacturing	120	115	119	128	121	1
Mining	(D)	(D)	(D)	(D)	(D)	(D)
Construction	64	25	34	87	151	136
Trans., Comm., and Public Utilities	(D)	(D)	(D)	88	99	(D)
Trade	169	160	158	167	165	- 2
Finance, Insurance and Real Estate	(D)	(D)	(D)	19	23	(D)
Services	79	79	68	(D)	(D)	(D)
Other	--	--	--	--	--	---

Source: Department of Commerce, Bureau of Economic Analysis, Regional Analysis Division. Unpublished Computer printout.

(D) Not shown to avoid disclosure of confidential information. Data included in totals.

Industries in Hulett
Crook County

Major Firm	Products & Services	Market Area	Employees
Neiman Post & Pole	Posts and building poles By-product: mill residue	Wyoming & adjoining states	7
Neiman Sawmill Inc.	Sawmill - rough and planes lumber	National	40
Johnson's Sawmill	Sawmill By-product: mill residue	National	20 - 25
Timberline Logging	Logging contractor	Wyoming	4 - 8

Industries in Moorcroft

Major Firm	Products & Services	Market Area	Employees
True Oil Company	Oil drilling	Wyoming	50
Dick's Hot Oil Service	Oil & gas field service	Wyoming & adjoining states	5

Industries in Sundance

Major Firm	Products & Services	Market Area	Employees
Lytle Sawmill	Sawmill By-product: mill residue	Wyoming & adjoining states	5
Roberts Construction Company	Ready Mix Concrete	Wyoming	5

Source: Wyoming Industrial Development Corporation, Economic Blueprint Component of Public Investment Plan, (1975).

EXHIBIT I-C-12
Employment by Type and Broad Industrial Sources

Goshen County

	1970	1971	1972	1973	1974	% Δ 1970-74
Total Employment	4,515	4,605	4,650	4,908	4,955	10%
Total Number of Proprietors	1,520	1,524	1,539	1,527	1,528	1
Farm	903	883	872	862	861	- 5
Non-Farm	617	641	667	665	667	8
Wage and Salary Employment	2,995	3,081	3,111	3,381	3,427	14
Farm	342	342	343	343	344	1
Non-Farm	2,653	2,739	2,768	3,038	3,083	16
Government	824	872	879	1,017	972	18
Total Federal	85	90	93	88	91	7
Federal Civilian	85	90	93	88	91	7
Military	--	--	--	--	--	---
State and Local	739	782	786	929	881	19
Private Non-Farm	1,829	1,867	1,889	2,021	2,111	15
Manufacturing	303	270	319	328	319	5
Mining	(D)	(D)	(D)	(D)	--	---
Construction	75	113	126	178	173	131
Trans., Comm., and Public Utilities	180	193	193	200	195	8
Trade	668	710	721	748	780	17
Finance, Insurance and Real Estate	(D)	(D)	(D)	(D)	(D)	(D)
Services	448	456	381	401	469	5
Other	(D)	(D)	(D)	(D)	(D)	(D)

Source: Department of Commerce, Bureau of Economic Analysis, Regional Analysis Division. Unpublished Computer printout.

(D) Not shown to avoid disclosure of confidential information. Data included in totals.

EXHIBIT I-C-13

Goshen County
Industries in Torrington

Major Firm	Products & Services	Market Area	Employees
Torrington Cement Products Co., Inc.	Concrete block and brick, ready mix, sand & gravel	Wyoming & adjoining states	15-20
Scottys By-Products, Inc.	Meat by-products	National	15-20
Farr Wyoming Co.	Process & sell dry edible beans	National	1-8
Holly Sugar	Granulated white sugar pulp pellets By-products: dry pulp-as feed, molasses-used in feed production	National	150-400 seasonal
Kelly Pack, Inc.	Meat packing By-product: meat scrap	Wyoming	7
Torrington Printing Co.	Newspaper and commercial printing	Wyoming	11
Precision Chassis Inc.	Metal fabrication (metal stamping)	National	9
Simplot Soilbuilders	Phosphatic fertilizers	National	9-25
Z & W Mill	Livestock feeds	Wyoming & adjoining states	9-25

Source: Wyoming Industrial Development Corporation, Economic Blueprint Component of Public Investment Plan, (1975).

EXHIBIT I-C-14

Employment by Type and Broad Industrial Sources

Johnson County

	1970	1971	1972	1973	1974	% Δ 1970-74
Total Employment	2,406	2,352	2,347	2,446	2,635	10%
Total Number of Proprietors	683	693	707	703	704	3
Farm	297	290	287	284	284	- 4
Non-Farm	386	403	420	419	420	9
Wage and Salary Employment	1,723	1,659	1,640	1,743	1,931	12
Farm	184	183	184	184	184	---
Non-Farm	1,539	1,476	1,456	1,559	1,747	14
Government	448	457	453	494	484	8
Total Federal	37	36	37	37	42	14
Federal Civilian	37	36	37	37	42	14
Military	--	--	--	--	--	---
State and Local	411	421	416	457	442	8
Private Non-Farm	1,091	1,019	1,003	1,065	1,263	16
Manufacturing	90	77	71	(D)	(D)	(D)
Mining	91	110	144	(D)	204	123
Construction	177	94	97	106	174	- 2
Trans., Comm., and Public Utilities	70	74	77	87	86	23
Trade	365	357	337	296	354	- 3
Finance, Insurance and Real Estate	(D)	45	(D)	48	57	(D)
Services	253	262	230	286	294	16
Other	(D)	--	(D)	2	(D)	(D)

Source: Department of Commerce, Bureau of Economic Analysis, Regional Analysis Division. Unpublished Computer printout.

(D) Not shown to avoid disclosure of confidential information. Data included in totals.

EXHIBIT I-C-15

Johnson County

Industries in Buffalo

Major Firm	Products & Services	Market Area	Employees
Reeves Concrete Products	Ready mix concrete	Wyoming & adjoining states	27
Big Horn Meat Cutting	Meat packing: wild game processor	Wyoming	10-25
Buckingham Lumber Company	Sawmill: rough & finished lumber By-product: mill residue	Wyoming & adjoining states	15
Northern Seed Co. Inc.	Animal feed	Wyoming	15
Peterson Forest Products, Inc.	Logging contractor	Wyoming	18
Shell Oil Co.	Crude petroleum & natural gas	National	25-50
Buffalo Bulletin, Inc.	Newspaper	Wyoming	16

Source: Wyoming Industrial Development Corporation, Economic Blueprint Component of Public Investment Plan, (1975).

EXHIBIT I-C-16

Employment by Type and Broad Industrial Sources

Natrona County

	1970	1971	1972	1973	1974	% Δ 1970-74
Total Employment	23,323	23,698	23,793	25,235	26,683	14%
Total Number of Proprietors	2,316	2,387	2,474	2,463	2,469	7
Farm	253	247	245	242	242	- 4
Non-Farm	2,063	2,140	2,229	2,221	2,227	8
Wage and Salary Employment	21,007	21,311	21,319	22,772	24,214	15
Farm	230	229	229	229	229	--
Non-Farm	20,777	21,082	21,090	22,543	23,985	15
Government	3,784	3,824	3,700	4,115	3,971	5
Total Federal	649	624	589	562	594	- 8
Federal Civilian	649	621	589	560	592	- 8
Military	3	3	2	2	2	-33
State and Local	3,135	3,200	3,111	3,553	3,377	8
Private Non-Farm	16,993	17,258	17,390	18,428	20,014	18
Manufacturing	1,614	1,847	1,786	1,818	1,631	1
Mining	3,361	3,003	2,964	3,212	3,958	18
Construction	1,202	1,373	1,403	1,720	1,726	44
Trans., Comm., and Public Utilities	1,707	1,640	1,602	1,697	1,739	2
Trade	4,833	5,044	5,121	5,322	5,853	21
Finance, Insurance and Real Estate	834	824	838	831	905	9
Services	3,394	3,472	3,605	3,768	4,137	22
Other	48	55	71	60	65	35

Source: Department of Commerce, Bureau of Economic Analysis, Regional Analysis Division. Unpublished Computer printout.

(D) Not shown to avoid disclosure of confidential information. Data included in totals.

EXHIBIT I-C-17

Employment by Type and Broad Industrial Sources

Niobrara County

	1970	1971	1972	1973	1974	% Δ 1970-74
Total Employment	1,470	1,469	1,430	1,401	1,396	5%
Total Number of Proprietors	562	561	567	563	564	--
Farm	345	337	333	329	329	- 5
Non-Farm	217	224	234	234	235	8
Wage and Salary Employment	908	908	863	838	832	- 8
Farm	96	96	96	96	96	--
Non-Farm	812	812	767	742	736	- 9
Government	203	209	206	230	221	9
Total Federal	24	23	23	22	22	- 8
Federal Civilian	24	23	23	22	22	- 8
Military	--	--	--	--	--	--
State and Local	179	186	183	208	199	11
Private Non-Farm	609	603	561	512	515	-15
Manufacturing	33	31	30	32	39	18
Mining	(D)	(D)	(D)	(D)	(D)	(D)
Construction	56	67	47	31	22	-61
Trans., Comm., and Public Utilities	40	40	40	37	38	- 5
Trade	203	235	260	207	213	5
Finance, Insurance and Real Estate	26	27	26	25	26	--
Services	173	168	103	122	122	-29
Other	(D)	(D)	(D)	(D)	(D)	(D)

Source: Department of Commerce, Bureau of Economic Analysis, Regional Analysis Division. Unpublished Computer printout..

(D) Not shown to avoid disclosure of confidential information. Data included in totals.

EXHIBIT I-C-18

Niobrara County

Industries in Lusk

Major Firm	Products & Services	Market Area	Employees
C & H Refinery	White gas, kerocene, tractor fuel	Wyoming	1-8
Ranchers Feed Service	Prepared feed for animals	Wyoming	11
The Lusk Herald	Newspaper & commercial printing	Wyoming	12
Vollmer Gargage and Machine Shop	Manufacture leaf springs and other machine shop work	Wyoming	9
Rawhide Milling Co.	Manufacture snowfence, building construction	Wyoming & adjoining states	10

Source: Wyoming Industrial Development Corporation, Economic Blueprint Component of Public Investment Plan, (1975).

EXHIBIT I-C-19

Employment by Type and Broad Industrial Sources

	Platte County					
	1970	1971	1972	1973	1974	% Δ 1970-74
Total Employment	2,892	2,987	2,914	3,050	3,162	9%
Total Number of Proprietors	934	932	943	936	937	--
Farm	533	521	515	509	509	- 5
Non-Farm	401	411	428	427	428	7
Wage and Salary Employment	1,958	2,055	1,971	2,114	2,225	14
Farm	148	148	148	148	148	--
Non-Farm	1,810	1,907	1,823	1,966	2,077	15
Government	509	541	539	628	611	20
Total Federal	92	98	90	92	102	11
Federal Civilian	92	98	90	92	102	11
Military	--	--	--	--	--	--
State and Local	417	443	449	536	509	22
Private Non-Farm	1,301	1,366	1,284	1,338	1,466	13
Manufacturing	41	43	52	68	73	78
Mining	(D)	(D)	(D)	(D)	(D)	(D)
Construction	101	103	41	60	76	-25
Trans., Comm., and Public Utilities	169	161	161	164	169	--
Trade	410	453	441	459	514	25
Finance, Insurance and Real Estate	42	49	54	54	62	48
Services	(D)	(D)	(D)	(D)	(D)	(D)
Other	(D)	(D)	(D)	(D)	(D)	(D)

Source: Department of Commerce, Bureau of Economic Analysis, Regional Analysis Division. Unpublished Computer printout.

(D) Not shown to avoid disclosure of confidential information. Data included in totals.

Platte County

EXHIBIT I-C-20

Industries in Wheatland

Major Firm	Products & Services	Market Area	Employees
Basin Engr. Co.Inc.	Mfg. & supply white marble	National	35
C.H. Brown	Grain mill		15
Lidstrom Inc.	Concrete const. & redi-mix supplier	Wyoming	30
Blevins Mfg. Co. Inc.	Stirrup adjusting buckle	National - international	6
Starrline Versatile Trailers	Mfg. trailers, campers & stock trailers	National	15
Drubes Machine Shop Inc.	Hay machinery & general machine work & welding	Wyoming & adjoining states	10

Industries in Guernsey

Major Firm	Products & Services	Market Area	Employees
CF&I Steel Corp. - Sunrise Mine	Iron ore	Colorado	240
Guernsey Stone Co.	crushed & broken limestone	Wyoming & adjoining states	25 - 50

Source: Wyoming Industrial Development Corporation, Economic Blueprint Component of Public Investment Plan, (1975).

EXHIBIT I-C-21

Employment by Type and Broad Industrial Sources

Sheridan County

	1970	1971	1972	1973	1974	% Δ 1970-74
Total Employment	7,845	7,980	8,080	8,359	8,571	9%
Total Number of Proprietors	1,480	1,507	1,543	1,534	1,537	4
Farm	514	503	497	491	491	- 4
Non-Farm	966	1,004	1,046	1,043	1,046	8
Wage and Salary Employment	6,365	6,473	6,537	6,825	7,034	11
Farm	298	297	298	297	297	--
Non-Farm	6,067	6,176	6,239	6,528	6,737	11
Government	1,756	1,835	1,861	2,049	2,019	15
Total Federal	629	632	636	611	648	3
Federal Civilian	623	627	632	606	543	3
Military	6	5	4	5	5	-17
State and Local	1,127	1,203	1,225	1,438	1,371	22
Private Non-Farm	4,311	4,341	4,378	4,479	4,718	9
Manufacturing	366	385	357	414	357	- 2
Mining	(D)	(D)	(D)	100	(D)	(D)
Construction	516	491	452	523	685	33
Trans., Comm., and Public Utilities	368	357	347	431	373	1
Trade	1,473	1,503	1,568	1,563	1,614	10
Finance, Insurance and Real Estate	194	209	218	225	238	23
Services	1,150	1,142	1,222	1,173	1,288	12
Other	(D)	(D)	(D)	50	(D)	(D)

Source: Department of Commerce, Bureau of Economic Analysis, Regional Analysis Division. Unpublished Computer printout.

(D) Not shown to avoid disclosure of confidential information. Data included in totals.

EXHIBIT I-C-22

Sheridan County

Industries in Sheridan

Major Firm	Products & Services	Market Area	Employees
Jersey Creamery	Dairy - ice cream	Wyoming & adjoining states	54
Sheridan Meat	Meat packing	National	48
VA Hospital	Mental health		456
Big Horn Coal	Coal	Wyoming & adjoining states	50-99
Wyoming Sawmills	Building studs By-product: mill residue	National	50
Germain's Incorporated	Palleted sugar beet seed	National	8
Northern Seed Company	Feed	Wyoming	25-50

Source: Wyoming Industrial Development Corporation, Economic Blueprint Component of Public Investment Plan, (1975).

EXHIBIT I-C-23

Employment by Type and Broad Industrial Sources

Weston County

	1970	1971	1972	1973	1974	% Δ 1970-74
Total Employment	2,717	2,750	2,771	2,918	2,979	10%
Total Number of Proprietors	657	662	676	672	673	2
Farm	260	254	251	248	248	- 5
Non-Farm	397	408	425	424	425	7
Wage and Salary Employment	2,060	2,088	2,095	2,246	2,306	12
Farm	78	77	77	77	77	- 1
Non-Farm	1,982	2,011	2,018	2,169	2,229	12
Government	491	502	489	561	540	10
Total Federal	59	61	61	58	62	5
Federal Civilian	59	61	61	58	62	5
Military	--	--	--	--	--	---
State and Local	432	441	428	503	478	11
Private Non-Farm	1,491	1,509	1,529	1,608	1,689	13
Manufacturing	102	161	(D)	223	197	93
Mining	439	395	387	446	506	15
Construction	26	37	47	52	58	123
Trans., Comm., and Public Utilities	228	250	234	254	259	14
Trade	356	354	346	346	370	4
Finance, Insurance and Real Estate	(D)	(D)	(D)	(D)	(D)	(D)
Services	293	261	263	241	248	- 15
Other	(D)	(D)	(D)	(D)	(D)	(D)

Source: Department of Commerce, Bureau of Economic Analysis, Regional Analysis Division. Unpublished Computer printout..

(D) Not shown to avoid disclosure of confidential information. Data included in totals.

EXHIBIT I-C-24

Weston County

Industries in Newcastle

Major Firm	Products & Services	Market Area	Employees
Cambria Forest Industries, Inc.	One inch random width lumber By-product: Sawmill residue	National	100
Updike Bros. Inc.	Oil & gas field service	Wyoming	100
Tesoro Petroleum Corp.	Petroleum refining	Wyoming & adjoining states	57
Wyoming Beef Packing Processing	Meat packing plant	Wyoming	1-8
Farnsworth & Kaiser Drilling Company	Drilling oil & gas wells	Wyoming & adjoining states	100 - 250
Plains Pipe Line Division	Pipe oil	Wyoming & adjoining states	26

Industries in Upton

Major Firm	Products & Services	Market Area	Employees
Federal Bentonite	Bentonite	National	21
American Colloid Co.	Bentonite	National & international	40

Source: Wyoming Industrial Development Corporation, Economic Blueprint Component of Public Investment Plan, (1975).

EXHIBIT I-C-25

SEASONALITY OF LABOR FORCE UNEMPLOYMENT
1974

Campbell County

	Jan.	June	Dec.	Annual Average
Civilian Labor Force	4,840	5,890	6,200	5,600
Total unemployment	160	200	190	150
Unemployment rate	3.3	3.3	3.1	2.7
Total employment	4,680	5,690	6,010	5,450

Converse County

	Jan.	June	Dec.	Annual Average
Civilian Labor Force	3,030	3,820	3,490	3,480
Total unemployment	110	110	110	100
Unemployment rate	3.7	2.9	3.1	2.9
Total employment	2,920	3,710	3,380	3,380

Crook County

	Jan.	June	Dec.	Annual Average
Civilian Labor Force	1,680	2,300	1,820	2,040
Total unemployment	110	40	80	70
Unemployment rate	6.4	1.8	4.4	3.4
Total employment	1,570	2,260	1,740	1,970

Goshen County

	Jan.	June	Dec.	Annual Average
Civilian Labor Force	5,010	5,800	5,310	5,430
Total unemployment	180	130	160	160
Unemployment rate	3.6	2.2	3.0	3.0
Total employment	4,830	5,670	5,150	5,270

EXHIBIT I-C-25
(cont'd)

Johnson County

	Jan.	June	Dec.	Annual Average
Civilian Labor Force	2,270	3,150	2,830	2,810
Total unemployment	140	80	90	80
Unemployment rate	6.2	2.4	3.1	2.8
Total employment	2,130	3,070	2,740	2,730

Niobrara County

	Jan.	June	Dec.	Annual Average
Civilian Labor Force	1,090	1,410	1,210	1,250
Total unemployment	60	50	40	30
Unemployment rate	5.9	3.8	3.5	2.4
Total employment	1,030	1,360	1,170	1,220

Platte County

	Jan.	June	Dec.	Annual Average
Civilian Labor Force	2,810	3,590	3,130	3,300
Total unemployment	100	90	90	90
Unemployment rate	3.5	2.4	3.0	2.7
Total employment	2,710	3,500	3,040	3,210

Sheridan County

	Jan.	June	Dec.	Annual Average
Civilian Labor Force	7,690	8,850	8,060	8,310
Total unemployment	460	280	400	340
Unemployment rate	6.0	3.2	5.0	4.1
Total employment	7,230	8,570	7,660	7,970

EXHIBIT I-C-25
(cont'd)

Weston County

	Jan.	June	Dec.	Annual Average
Civilian Labor Force	2,600	2,960	2,840	2,800
Total unemployment	90	100	110	80
Unemployment rate	3.6	3.4	3.9	2.9
Total employment	2,510	2,860	2,730	2,720

Source: Wyoming Industrial Development Corporation, Economic Blueprint Component of Public Investment Plan, (1975).

Employment Security Commission of Wyoming,

EXHIBIT I-C-26

SEASONAL LABOR FORCE DISTRIBUTION 1974

Campbell County

Industry Group	Jan.	June	Dec.
Not covered by Wyoming Unemployment Insurance			
Fed. Govt.	40	40	40
Railroads	10	10	10
Agriculture	520	1,050	580
Non-agriculture	910	980	1,060
Non-profit institutions	20	20	20
State & local Govt.	420	410	430
All other non-agriculture	470	550	610
Covered by Wyoming Unemployment Insurance			
Mining	1,185	1,175	1,409
Contract Construction	369	451	765
Manufacturing	39	38	52
Transportation, Communications & Utilities	292	323	410
Wholesale & Retail Trade	940	1,108	1,181
Wholesale Trade	137	168	181
Retail Trade	803	940	1,000
Finance, Insurance & Real Estate	109	121	146
Services & Government with Agriculture, Forestry & Fisheries	500	652	666

Source: Wyoming Industrial Development Corporation, Economic Blueprint Component of Public Investment Plan, (1975).

EXHIBIT I-C-27

1974

SEASONAL LABOR FORCE DISTRIBUTION

Converse County

Industry Group	Jan.	June	Dec.
Not covered by Wyoming Unemployment Insurance			
Fed. Govt.	40	50	40
Railroads	10	10	10
Agriculture	420	840	460
Non-agriculture	820	910	910
Non-profit institutions	30	40	40
State & local Govt.	350	340	360
All other non-agriculture	440	530	510
Covered by Wyoming Unemployment Insurance			
Mining	404	435	502
Contract Construction	138	199	203
Manufacturing	18	40	46
Transportation, Communications & Utilities	348	355	385
Wholesale & Retail Trade	361	520	423
Wholesale Trade	19	35	17
Retail Trade	342	485	406
Finance, Insurance & Real Estate	72	69	87
Services with Agriculture, Forestry & Fisheries, & Local Government	218	208	235

Source: Wyoming Industrial Development Corporation, Economic Blueprint Component of Public Investment Plan, (1975).

EXHIBIT I-C-28

SEASONAL LABOR FORCE DISTRIBUTION
1974
Crook County

Industry Group	Jan.	June	Dec.
Not covered by Wyoming Unemployment Insurance			
Fed. Govt.	60	80	40
Railroads	10	10	10
Agriculture	370	750	410
Non-agriculture	530	600	570
Non-profit institutions	40	50	50
State & local Govt.	280	270	290
All other non-agriculture	210	280	230
Covered by Wyoming Unemployment Insurance			
Mining	117	119	135
Contract Construction	75	186	106
Manufacturing	114	127	111
Transportation, Communications & Utilities	78	95	95
Wholesale & Retail Trade	128	181	172
Wholesale Trade	8	6	6
Retail Trade	120	175	166
Finance, Insurance, and Real Estate	22	22	19
Services with Local Government	44	63	51

Source: Wyoming Industrial Development Corporation, Economic Blueprint Component of Public Investment Plan, (1975).

EXHIBIT I-C-29

SEASONAL LABOR FORCE DISTRIBUTION 1974

Goshen County

Industry Group	Jan.	June	Dec.
Not covered by Wyoming Unemployment Insurance			
Fed. Govt.	70	80	80
Railroads	60	60	60
Agriculture	850	1,700	940
Non-agriculture	1,400	1,440	1,440
Non-profit institutions	110	130	120
State & local Govt.	660	660	660
All other non-agriculture	630	650	660
Covered by Wyoming Unemployment Insurance			
Agriculture, Forestry & Fisheries	62	48	82
Contract Construction	123	204	131
Manufacturing	421	229	423
Transportation, Communications & Utilities	150	140	177
Wholesale & Retail Trade	735	818	786
Wholesale Trade	106	104	83
Retail Trade	629	714	703
Finance, Insurance & Real Estate	108	100	108
Services & Government	371	385	416

Source: Wyoming Industrial Development Corporation, Economic Blueprint Component of Public Investment Plan, (1975).

EXHIBIT I-C-30

SEASONAL LABOR FORCE DISTRIBUTION 1974

Johnson County

Industry Group	Jan.	June	Dec.
Not covered by Wyoming Unemployment Insurance			
Fed. Govt.	40	30	40
Railroads	0	0	0
Agriculture	350	700	520
Non-agriculture	630	720	720
Non-profit institutions	50	60	60
State & local Govt.	350	340	360
All other non-agriculture	230	320	300
Covered by Wyoming Unemployment Insurance			
Mining	159	214	181
Contract Construction	91	169	303
Manufacturing	71	99	94
Transportation, Communications & Utilities	74	80	87
Wholesale & Retail Trade	276	413	334
Wholesale Trade	10	9	13
Retail Trade	266	409	321
Finance, Insurance & Real Estate	50	53	57
Services with Agriculture, Forestry & Fisheries, & Local Government	154	242	195

Source: Wyoming Industrial Development Corporation, Economic Blueprint Component of Public Investment Plan, (1975).

EXHIBIT I-C-31

SEASONAL LABOR FORCE DISTRIBUTION 1974

Niobrara County

Industry Group	Jan.	June	Dec.
Not covered by Wyoming Unemployment Insurance			
Fed. Govt.	20	20	20
Railroads	10	10	10
Agriculture	260	530	290
Non-agriculture	370	390	400
Non-profit institutions	0	0	0
State & local Govt.	180	180	180
All other non-agriculture	190	210	220
Covered by Wyoming Unemployment Insurance			
Mining	61	57	73
Contract Construction	36	38	24
Manufacturing	31	30	34
Transportation, comm. & Utilities	31	41	42
Wholesale & retail trade	191	205	217
Wholesale Trade	17	32	29
Retail Trade	174	173	188
Finance, ins. & real estate	22	28	27
Services with agriculture, forestry & fisheries & local gov't.	38	47	40

Source: Wyoming Industrial Development Corporation, Economic Blueprint Component of Public Investment Plan, (1975).

EXHIBIT I-C-32

SEASONAL LABOR FORCE DISTRIBUTION 1974

Platte County

Industry Group	Jan.	June	Dec.
Not covered by Wyoming Unemployment Insurance			
Fed. Govt.	50	60	50
Railroads	80	80	80
Agriculture	530	910	590
Non-agriculture	650	690	690
Non-profit institutions	30	30	30
State & local Govt.	380	370	390
All other non-agriculture	240	290	270
Covered by Wyoming Unemployment Insurance			
Mining	279	303	307
Contract Construction	63	86	79
Manufacturing	68	83	62
Transportation, Communications & Utilities	100	130	104
Wholesale & Retail Trade	420	571	521
Wholesale Trade	45	53	48
Retail Trade	375	518	473
Finance, Insurance & Real Estate	56	62	63
Services with Agriculture, Forestry & Fisheries & Local Government	119	150	146

Source: Wyoming Industrial Development Corporation, Economic Blueprint Component of Public Investment Plan, (1975).

EXHIBIT I-C-33

SEASONAL LABOR FORCE DISTRIBUTION 1974

Sheridan County

Industry Group	Jan.	June	Dec.
Not covered by Wyoming Unemployment Insurance			
Fed. Govt.	590	630	620
Railroads	100	110	100
Agriculture	660	1,330	730
Non-agriculture	2,090	2,180	2,130
Non-profit institutions	130	150	140
State & local Govt.	1,030	1,030	1,080
All other non-agriculture	930	1,000	910
Covered by Wyoming Unemployment Insurance			
Agriculture, Forestry & Fisheries	46	66	60
Mining	111	103	137
Contract Construction	492	844	605
Manufacturing	354	374	294
Transportation, Communications & Utilities	376	263	241
Wholesale & Retail Trade	1,502	1,606	1,734
Wholesale Trade	191	221	211
Retail Trade	1,313	1,385	1,523
Finance, Insurance & Real Estate	231	231	241
Services & Local Government	845	929	948

Source: Wyoming Industrial Development Corporation, Economic Blueprint Component of Public Investment Plan, (1975).

EXHIBIT I-C-34

SEASONAL LABOR FORCE DISTRIBUTION 1974

Weston County

Industry Group	Jan.	June	Dec.
Not covered by Wyoming Unemployment Insurance			
Fed. Govt.	60	50	60
Railroads	20	20	20
Agriculture	160	320	180
Non-agriculture	760	800	790
Non-profit institutions	30	40	30
State & local Govt.	400	390	410
All other non-agriculture	330	370	350
Covered by Wyoming Unemployment Insurance			
Mining	464	503	545
Contract Construction	41	60	62
Manufacturing	203	189	174
Transportation, Communications & Utilities	237	248	227
Wholesale & Retail Trade	321	389	407
Wholesale trade	29	22	29
Retail trade	292	367	378
Finance, Insurance, and Real Estate	52	51	49
Services & Local Government	149	179	162

Source: Wyoming Industrial Development Corporation, Economic Blueprint Component of Public Investment Plan, (1975).

D. Public Attitudes: Eastern Wyoming

In interpreting the attitudes and values of residents of the eastern Wyoming counties of Sheridan, Johnson, Campbell, Crook, Weston, Natrona, Converse, Niobrara, Platte, and Goshen, it is important to understand two very significant aspects of this region. In the first place, the values and attitudes of the entire area are colored by the rural/agrarian nature of the way of life which has historically pervaded the area. This agrarian orientation consists of four fundamental claims. First, a person is viewed as an independent actor who is the equal of all other men, in partnership with God and is self-sufficient. Second, agriculture is the basic industry on which all progress and prosperity is based. Third, agricultural life is natural and morally desirable while urban living is neither. Urban living is believed to produce an emphasis on the evils of leisure and materialism in place of hard work and asceticism.[1] Finally, rural values have been characterized as emphasizing the familial, especially the extended family of grandparents, aunts, uncles, and cousins.[2]

Residents of rural Wyoming have developed a version of this agrarian orientation whose uniqueness is often noted. It is characterized by a short, direct way of saying and doing things. John Gunther noted that is is less sophisticated and cosmopolitan, but more open, western, frontier-like and friendly than the Colorado version. Neil Morgan stresses that it includes tremendous affinity with the land and the past. It is a version which is built around a life experience where time and man have left little marks on the environment. Finally, the Wyoming version is greatly influenced by the dominance of the range and grazing as an idealized way of life. People involved in raising livestock, especially cattle, have traditionally been taken as the role model for Wyoming's residents. It is truly unfortunate that up-to-date, detailed data are not available to determine the degree to which this unique version of the rural ideology is accepted by contemporary residents.

The second aspect of the region involves recent changes which may have created a fair amount of diversity and introduced alternative value systems and

attitudinal sets. The changes began in the late 1960s and have accelerated significantly during the last five years. They consist primarily of the development of energy resources and associated industrialization such as in Campbell, Douglas, and Natrona Counties and planned developments and construction such as those in Weston, Platte, and Crook Counties. These changes may be viewed as having several consequences for values and attitudes for which there is a clear theoretical rationale, though there may not be extensive data for confirmation.

One consequence is the boom town effect. Large numbers of communities in the area either have experienced growth of over ten percent or are projected to experience it -- a growth rate characterized as a boom town rate.[3] The boom town has been found to be characterized by few friendships, religious ties, or social bonds between newcomers and long-term residents. In addition, the newcomers are more likely to be dissatisfied with local services and facilities such as schools and medical care[4]. In addition, long-term residents view the effects of development as falling below their expectations. Third there are basic cultural differences between newcomers and long-term residents resulting from the fact that newcomers are younger and better educated, have fewer children, and receive more income.[5] Fourth, boom town living has been asserted to be characterized by transiency on residences, education, social ties, and family[6]. Finally, boom towns are believed to have a high incidence of mental illness, crime, and normlessness.[7]

Another consequence is the emergence of a collection of attitudes and values associated with urbanization and industrialization. Industrialization is frequently characterized as having triggered a process which relentlessly attacks the bastions of rural values. One study[8] argues that "the structural bases of industrialization require that rural values be replaced. They contend that industrialization requires occupational mobility, a break-up of the extended family, continual-rapid social change, value of technical education,

occupational differentiation, large-scale organization, and urban dominance. Agriculture, they argue, is no longer a sacred enterprise,

> "[it] is simply another industry; it is not a 'way of life' to be preserved for its own value or because it constitutæd a traditional and antecedent form of society. Agriculture serves the sole purpose of providing a variety of agricultural outputs for the economies."[9]

An industrial society adopts the values of the city, giving up those of agriculture. Much as Marx expected the dictatorship of the Proletariat to shed its capitalistic antecedents, Kerr, et. al., believe the industrial society will free itself of its agricultural antecedents.

The development of industrial society with its technological innovations which make rapid, long-range transportation, news and entertainment media, and public-compulsory education available in standard form to the total citizenry of every society, has produced mass society.[10] Others point out that mass society is consistently intended to result in a homogenization of culture across all areas and groups.[11] The direct impact of mass society on rural values is assumed to result in a decline in their distinctiveness and in their becoming increasingly cosmopolitan[12]. This trend was noted with particular frequency in the 1960s.[13]

The development of industrial society and the emergence of mass society, is believed to have both made possible and in some sense required, the organizational revolution. Two decades ago, a noted analyst observed that there appears to be a "world-wide increase in the number, size, and power of organizations."[14] Others have since stressed the pervasiveness of organization or juristic persons in modern society, and have argued that those divulgents have produced significant value charges in the United States.[15] They point out that as a consequence of organizational domination, values have shifted from individuality to obedience, from indispensibility of individuals to their dispensibility, from community to specialization, from spontaneity to planning,

and from voluntarism to paternalism. The organizational revolution with these implications for values has not been restricted to urban areas. Rural areas have experienced the introduction of industry,[16] the extension of nationwide franchises, and the development of agri-corporations.[17]

In summary, the traditional agrarian attitudes and values of the area are being challenged by the boom town effects and the process of industrialization. Any assessment of specific and current values and attitudes must take this into account. The potential for rapid change and for conflict are both strongly present.

1. Attitudes Toward Land Use in General

Historically, the entire ten-county area has been strongly opposed to any form of land use planning. It has accepted a relatively laisez faire attitude. Recently, however, a general acceptance of some forms of land use control has developed, especially to protect agricultural and recreational land uses. The recreational use protected is that valued locally, not for nationwide, mass recreation. The acceptance is also generally restricted to the county level or at most that of the state. One indication of the support for some evaluation of land use and its control are the number of needs surveys, interim concept plans, and general comprehensive plans now prepared or being prepared.[18] In Sheridan County, 59 percent of those responding to a needs survey indicated they favor land use control, but only 33 percent oppose them. Similarly, 73 percent of a sample of Platte County residents favored zoning for specific uses, only 13 percent oppose such activities.[19]

There are some indications of attitudes toward specific uses. A major concern appears to be preservation of natural resources. In Sheridan County, 63 percent would strongly encourage preservation of wildlife, forests, and recreational areas. An additional 28 percent would encourage such preservation. Only three percent would discourage them. In Campbell County, 44 percent expressed concern about damage to the environment; while only 15 percent were not concerned.[20]

In Campbell County, there is a lack of concensus about the desirability of coal mining. While 27 percent of a sample favor it, 24 percent oppose it and 49 percent have no opinion.[21] The Converse County plan suggests a desire to restrict urbanization, including residential, commercial, and industrial growth, to existing areas and to protect agriculture.[22]

2. Specific Land Areas, Objects and Things

The attitudes of citizens toward specific areas, objects, and things include some which are relatively uniform throughout the region. The land areas viewed as particularly significant include the Big Horn Mountains, the Cloud Peak Wilderness Area, Devil's Tower, the Bozeman Trail, Keyhole Reservoir, Lake DeSmet, and Pathfinder Reservoir and Wilflife Refuge. The first three are nationwide attractions, Devil's Tower, the first National monument in the country. They are the center of much recreational activity though not subject to the heavy use of such sites as Yellowstone National Park and Grand Teton National Park. Several rivers such as the Powder River, the North Platte River, and the Laramie River are also considered important due to their uses in meeting agricultural and municipal needs as well as providing some recreation.

The region contains the sites of several historical events of local significance and that have become part of our national folklore. These include sites of Indian battles, range wars, and old west legends. The major Indian battles took place near Fort Laramie, the Fetterman Massacre Monument, the location of the Wagon Box Fight, along the Powder River, and Fort Phil Kearney. The range wars took place primarily in Johnson County, but also extended through most of the planning area. The old west legends are built around robbers' roost, the stage line from Fort Laramie through Lusk and into the Black Hills, the Bozeman Trail, and along the Oregon Trail.

There were no surveys encountered by the research indicating specific attitudes and values held with respect to the sites discussed above. However, the general pride in history and land suggests that each site is viewed

locally with considerable pride. In addition to the areas with regionwide use and interest, each county and community in the area has specific areas and objects of local value and interest. Unfortunately, we have not been able to obtain land use surveys indicating what they are.

3. Area Development and Growth

There seems to be a general ambivalence towards growth and development of the area. On the one hand, most long-term residents of the counties have experienced a long period of population decline. This decline has been reversed in the past ten years for every SEPA county except Weston and Niobrara. In all SEPA counties, there is a desire to be able to remain and to have their children remain, both of which require some development.[23] There also are indications that most feel growth and development is inevitable. The ambivalence arises out of a concern for the consequences of development. The residents like their towns and the friendly atmosphere, an atmosphere directed toward the old-time residents, but which need not be extended to outsiders who are often viewed as fair game for exploitation. The residents report general satisfaction with services. They generally worry that growth may destroy this atmosphere.[24] For example, in Platte County, the residents report they would like limited economic growth and a population no larger than 15,000.[25]

There are some data indicating the sort of economic development desired. In the discussion all the reports indicate a concern, especially on the part of farmers and ranchers, that the agricultural sector not be negatively impacted by any growth. In Platte County, 61 percent of a random sample favored increased industrial activities, 31 percent opposed such increases. However, 46 percent would not introduce new industry at the cost of air and aesthetic quality; 24 percent would. Forty-eight percent favored population and economic growth as a way of improving the selection of consumer goods, but 23 percent disagreed with this.[26]

A survey of Campbell County residents[27] indicates a lack of concensus over the development of coal mining: 27 percent favor it, 24 percent do not and 49 percent are neutral. There is, however, broad agreement that strip-mining should occur only if there are adequate standards and enforcement procedures to assure that the land will be reclaimed: 77 percent desire the standards and enforcement, while seven percent do not; 61 percent are not willing to sacrifice clean air and aesthetic quality for industrialization, but 16 percent are.

The Sheridan County needs survey[28] asked which types of economic development would benefit the county. The areas of development viewed most desirable are those which would provide goods and services to an existing population. The next most desirable is the introduction of heavy industry which was most strongly supported in rural areas of the county. The development of agriculture and light industry was least supported by almost half of the respondents and, moreover, has least support in rural areas. Some combination of the six sectors is not as widely accepted as development of one of the sectors.

In general, the area's residents appear to support limited population and economic development, but not at the cost of the friendly small-town atmosphere or environmental quality. Interestingly, tourism does not emerge as an issue.

4. Government and its Entities

The tradition in eastern Wyoming has been to treat government, especially the federal government, as a threat to the strong, independent tradition of individualism and self-determination. However, some interest groups, such as environmentalists, have taken a different position with respect to the Big Horn area and strip mining by seeking to ally themselves with federal agencies. On the other hand, local government, especially city and county is widely accepted and relied on.

Three surveys indicate the degree to which residents are satisfied with the services and facilities offered by local governmental agencies. In Platte County[29] residents are satisfied with all services and facilities, except medical care (43 percent dissatisfied) and shopping facilities (37 percent dissatisfied), neither of which is under the direct control of government, but which may be facilitated by it. There is reported a high level of satisfaction with schools (66 percent satisfied), law enforcement (62 percent satisfied), mail (84 percent satisfied), sewage and garbage service (66 percent satisfied), telephone (82 percent satisfied), electrical services (89 percent satisfied), fire protection (87 percent satisfied), town government (51 percent satisfied), county government (56 percent satisfied), welfare services (55 percent satisfied), religious services (81 percent satisfied).

In a similar survey of Campbell County residents,[30] the respondents reported satisfaction with waste (66 percent), sewage (91 percent), garbage (87 percent), electrical (89 percent, and gas (81 percent) services. There was more dissatisfaction reported for public services. Weak satisfaction was expressed with postal service, law enforcement, and schools. The respondents were neither satisfied nor dissatisfied with recreation. They were dissatisfied with medical services. (See Section II--Health)

In Sheridan County[31] 65 percent of the respondents to the needs survey indicated that county government was doing an efficient job; 26 percent disagreed. They felt that the greatest needs for improvement were in the areas of law enforcement, fire protection, water, housing for the elderly, and roads. One way, also, to evaluate local voters on the liberal-conservative spectrum is to look at each election, local state, and national, as it occurs.

In summary, the area's residents strongly favor action by local and state government over those by the federal government. There is general satisfaction with existing local governmental services. The voters are, politically, relatively conservative.

5. Outside Influences and People

No area-wide indicators of attitudes toward outside influences and people have been encountered, other than those discussed concerning the federal government. One study from western Wyoming provides some information which is probably accurate of eastern Wyoming, especially the boom town areas. A survey of Rock Springs residents indicates some attitudes towards outsiders or newcomers.[32] First, the results indicate virtually no non-work contacts between long-term residents and newcomers. Second, newcomers are viewed as transients interested in "entertainment" with a greater tendency to engage in criminal and other deviant acts. The criticisms are moderated by the recognition that the undesirables are a minority. In general outsiders are often characterized negatively by the residents of rural communities. The persons who receive such labels are usually involved in activities such as construction or new mining which competes with the current agricultural orientation. Others are labeled negatively because they have been given better jobs or opportunities over the local residents.

6. Citizens' Expectations

There is very little information concerning expectations of eastern Wyoming's citizen expectations, except that which has been reported in earlier sections. Those which are particularly important center around expected growth and development, but the strong desire to preserve the rural, small-town atmosphere and friendliness felt by long-term residents.

7. Ability to Pursue a Particular Lifestyle

There appears to be a fairly wide-spread concern over the individual's ability to pursue his chosen lifestyle, especially on the part of people who are in agriculture, who seek the old west lifestyle, or who enjoy outdoor recreation involving solitude. In addition, many newcomers, especially the well-educated, dislike the isolation, the lack of culture, and the unfriendliness of long-term residents.[33]

FOOTNOTES

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4. Old West Regional Commission, Construction Worker Profile, Billings, Montana, 1975.

5. Little, Ronald, Some Social Impacts of Boom Towns, Logan, Utah, 1976.

6. Kohrs, El Dean, Social Consequences of Boom Growth in Wyoming, Paper given at Rocky Mountain meeting of the American Association for the Advancement of Science, April 21-26, 1974, Laramie, Wyoming.

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8. Kerr, Clark, J. Dunlop, F. Harbison, and C. Myers, Industrialization and Industrial Man, Cambridge, Mass: Harvard Press, 1960.

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FOOTNOTES (cont'd)

14. Sheldon and Moore (eds.) op.cit.

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16. Summers, Gene and Frank Clements, "Industrial Development, Income Distribution, and Public Policy" Rural Sociology Vol. 41 (summer) 1976, (pp. 248-268); and Aines, Ronald, "Linkages in Control and Management with Agribusiness," in Ball, Gordon and Earl Heady/eds.), Size, Structure, and Future of Farms. Iowa State University Press, 1972.

17. Aines, Ronald, ibid.

18. Converse County Commission, Interim Concept Plan: Douglas Planning Area, Douglas, Wyoming, 1976; and Sheridan County Commission, Sheridan County Needs Survey Results, Sheridan, Wyoming (undated).

19. Thompson, J.,A. Blevins and C. Ellis, A Social Impact Assessment of the Proposed Laramie River Station in Platte County, Wyoming, Laramie, Wyoming, 1975.

20. Blevins, et.al., Social Impact Analysis of Campbell County, Laramie, Wyoming, 1974.

21. Ibid.

22. Douglas County Commission, op.cit..

23. Thompson, et.al., op.cit.; and Blevins, et. al., op.cit.

24. Thompson, et. al., op.cit.

25. Ibid.

26. Ibid

27. Blevins, et.al., op.cit.

28. Sheridan County Commission, op.cit.

29. Thompson, et.al., op.cit.

FOOTNOTES (cont'd)

30. Blevins, et.al., op.cit.

31. Sheridan County Commission, op.cit.

32. Old West Regional Commission, op.cit.

33. Ibid.; and
Thompson, et.al., op.cit, and
Blevins, et.al., op.cit.

E. Socio-Cultural Values: Eastern Wyoming

1. Racial and Native Values

The largest single collection of people, many of whose values diverge from those of the majority living in eastern Wyoming, are located on the Wind River and Crow Indian Reservations, neither of which is located within the SEPA area's boundaries, but whose influence spills over into the area. Two culturally distinct tribes are located on the Wind River Reservation: the Shoshone and the Arapaho. The Shoshone, historically have lived in the Idaho-Wyoming area. The Arapaho lived in the Plains reaching into southeastern Wyoming and eastern Colorado. It is unlikely that this group of Native Americans will affect the SEPA area.

A second immigrant group important in the Sheridan, Buffalo, and Kaycee area is the Basque population. Unfortunately, there is no data about values and attitudes specific to this cultural group, but there is some information concerning that culture in general. Typically, the Basques are extremely proud of their unique culture and language. They are often described as being brave, freedom-loving, and independent.

2. Religious Values

Religion has traditionally been less important in Wyoming than in the nation as a whole. For example, the last census of religion (completed in 1936) found only 30 percent of Wyoming's inhabitants were affiliated with an organized religion compared with about half of the population nationally.[1] There is little information available on the current religious make up or values of state residents, however, it is suggested that among the more mobile residents and inhabitants of the SEPA area, particularly newcomers to the area attracted by the development activities occurring there, organized religious values are not strong.[2] Among established religious in the SEPA, the most prominent are Catholic, Presbyterian and Latter-Day Saints.

3. Immigrant and Racial Values

The most sizable group in the area and one which may increase considerably over time, is the Mexican-American community. In particular, there are large numbers of migrant workers who come into the area to work during planting and harvesting seasons. It is also projected that increased numbers of Mexican-Americans will move into Campbell, Platte, Converse, and Goshen Counties for construction and mining operations that are planned to occur in those areas. A major feature of the Mexican-American values and lifestyle is the common cultural and language experiences of the people.[3] Together with a growing awareness of and participation in the larger Anglo community, Mexican-Americans are increasingly becoming outspoken on a variety of issues which affect their lives. By and large, little information is available which accurately characterizes this community and describes its values with regard to other-than-transient patterns of settlement. To the extent that Mexican-Americans have permanently settled and become involved in everyday community activities, their attitudes and values would more closely parallel those of the rest of the community.

Language is one of the bonds which holds the Mexican-American community together. Most Mexican-Americans are bilingual; some speak only Spanish; very few speak only English. Spanish is used by the majority as their primary language and its use is often accepted symbolically as a personal expression of the culture and heritage of the people.[4]

4. Cultural Diversity

Until recently, the communities of western Wyoming have been marked by the cultural homogeneity within each community, though there was considerable diversity between them. The diversity was held together by a common thread: the rural-agrarian theme. Hence, what is said of Rock Springs[5] could be said of most eastern Wyoming communities. They pride themselves on their:

> ". . . western way of life, which includes among its components, the following: small-town living with its customs of friendliness, neighborliness, and mutual aid; for a love of the great outdoors; and adherence to traditional, conservative values, including close family ties, traditional sex roles, and a strong religious life."[6]

The report continues to point out that some people fear that this lifestyle is slipping away. This is particularly true with the changing pace of life in the state.

Historically, the homogeneity of communities has been broken by several severe conflicts such as the Johnson County War between cattlemen and homesteaders and the conflict between sheepmen and cattlemen in the early 1900s. These conflicts were based on the view of the cattlemen concerning their rights to open grazing lands and also the incompatibility of sheep and cattle. However, the past two decades have seen major shifts in local livestock raising, including the decline in the number of sheep on the ranges and diversification by both sheepmen and cattlemen who often raise both kinds of livestock.

The formation of the Livestock Growers' Association to stand between the cattlemen and sheepmen made major steps in reconciling the two groups. The lack of recent surveys, however, makes it difficult to say how complete the reduction of conflict, both economically and socially, has been. It is quite possible that there are still undertones of past disagreements along with general divisions.

Probably, much more significant culturally than the past conflict between cattlemen and other groups, is the diversity now arising in the SEPA due to mineral extraction, industrialization, and a growing tourism industry. The major problem with the increased diversity within communities is that there are few friendships, religious or social bonds being formed between newcomers and long-term residents. In addition, the newcomers are more likely to be dissatisfied with local services and facilities such as the schools

and medical care.[7] The long-term residents view the effects of the construction operations as falling below their expectations. All of this is compounded by basic cultural and background differences resulting from the fact that newcomers tend to be of urban origin, are younger and better educated, have fewer children, and receive more income.[8]

One potential source of diversity may be the construction workers who basically fit the newcomer characterization sited above. One study reports having found three classes of construction workers:[9] The professionals who follow the trade out of a love of the work and are highly skilled; they are highly reliable and stay for the duration of a project. The travelers, who are also highly skilled, but love to travel; they move readily and upon the spur of the moment. The third group is called the searchers. They are not highly skilled nor dedicated to the profession. They are often temporarily uprooted from home or college. This group is the least reliable for both the company and the community.

The same study finds that the construction workers feel less satisfaction with housing and recreation than long-term residents, but they feel accepted by the community. It also reveals that construction workers in the area have values typical of blue-collar workers including emphasis on education.

There have been projected some additional features of the diversification of values. These suggest the following. In summary, diversity is increasing. Its increase is combined with basic value and background differences, little social contact between them, and perceptions about each other which are not always complimentary. New accommodations of value positions and new leadership structures may have to emerge if the concensus and cooperation needed to attack community problems is to be maintained.[10]

FOOTNOTES

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9. Thompson, J., A. Blevins, and C. Ellis, A Social Impact Assessment of the Proposed Laramie River Station in Platte County, Wyoming, Laramie, Wyoming, 1975.

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F. Consumption Patterns and Cost of Living

The trade and service patterns within the SEPA are principally focused on the Casper area. It serves as the major retail and service trade center and also has been growing as an important regional center for energy-related development and industrial activity. Company headquarters and associated service industry activities are located in Casper and are focused on the major oil and coal developments to the north in the area around Gillette and Campbell Counties.

As such, Casper and Natrona County with 610 retail establishments and 260 wholesale firms (Exhibit I-F-1), is the predominant trade center for the SEPA. Total retail and wholesal e sales in Natrona County-Casper were $364.8 million. Campbell County and the City of Gillette were the second-largest trade centers with 189 retail and ten wholesale establishments generating a total of $133.8 million. Interestingly, Sheridan County and the City of Sheridan, with 198 retail and 40 wholesale firms, had more retail/wholesale establishments than did Campbell County; but these brought in less combined revenue, only $72.1 million. By contrast, Sheridan's retail sector alone provided more sales than did Campbell County-Gillette. One reason suggested for this lies on the wholesale side of the picture since greater numbers of mineral development industries are located in and around Gillette, and these have associated trade and service goods as well as materials purchases. By and large, the general industrial development activity occurring in this part of the SEPA is reflected in the retail trade sales that are generated through increased consumer demand for goods and services and increased spending. To the extent that this demand can be met by the retail establishments in the area, spending will occur.

It should be pointed out, however, that while Casper is the second-largest commercial and trade center in the state, it is by no means a major retail trade center in the West. According to a recent study by the State

Department of Economic Planning and Development,[1] which examined employment by economic sectors, the market areas which make up the retail sector of Casper's trade cannot be determined. However, the figure calculated for Casper's retail trade employment relative to the city's overall employment (about 17 percent of total employment in Casper) amounts to a very low value. According to this study, this means that all of Casper's retail service employees are engaged in serving the Casper area predominantly. This suggests that Casper is not a significant central provider of retail trade compared to the rest of the state in terms of employment, and that retail trade activity is not a basic or export activity to the area. In terms of the patterns of consumer activities in the SEPA, it appears that, with the exception of those activities and centers outside of the state which attract shoppers to them, retail activity in the SEPA counties is for the most part localized within those counties.

Both ~~Casper~~ Sheridan and Gillette, the two communities which comprise the main secondary trade activity centers in the District are located relatively close to one another, in the northern part of the District, and as a result, they tend to compete against one another for consumer shopping. Generally, it is acknowledged that Sheridan, with its greater number of stores and main "downtown" shopping street is a stronger attraction[2] because of better variety and selection and due to increased cost competitiveness between firms.

Beyond the principal trade and business activity in Casper and the two larger secondary trade centers, discussed above, the other counties in the SEPA are principally local sales centers serving their area residents. Sales in these local areas are substantially below those of Casper-Gillette-Sheridan indicating the relative position of these communities within the SEPA business economy. Generally, it is the county seats which have developed into retail areas with perhaps one other town also having some commercial activity.

A major issue exists, however, beyond the competition among retail trade areas within the District. This focuses upon consumer shopping patterns and travel. It is acknowledged[3] that many consumers purchase such things as

major appliances, furniture, clothing, and even services and health care needs by going outside the region and the state. Billings, Montana, and Rapid City, South Dakota, are the principal cities for outside consumer spending because they offer greater variety and price competitiveness while being within easy driving distance of the northern SEPA counties. To a lesser degree, Denver, Colorado, also attracts significant numbers of shoppers. For the Casper area, this is not so much a factor given that city's established retail and commercial sector and the greater travel distances to reach these outside centers. But, for the residents of Gillette and Sheridan and the other smaller cities and towns north and east of Casper, the attraction and incentives to these shopping patterns are strong. The distances to outside trade centers from the respective northern and northeastern towns is about two hours' driving time along direct interstates.

Little documentation is available to amplify this issue. Because no figures are available which measure, for example, the amount of dollars flowing into or out of the SEPA or the percentage of disposable income spent outside of the region, precise measures of consumer dollars leaving the area are not available. It is clear, however, that expansion of the present retail sector (and very likely the wholesale, as well) in Casper and the other major retail centers, will be necessary before these consumer patterns are altered. Not until consumers can purchase a greater variety of goods and services at competitive prices locally will they forego these trips outside the state. And, because of the relatively short driving times to these destinations, it is unlikely that the pattern will ever be eliminated. For example, while Wyoming has a state and selective local sales tax amounting to three or four percent, Montana has no sales tax applied to tourist purchases.

Based on a study completed in 1973, limited data are available which look at the relationships between rural communities and their service areas (both economic and health) and between rural communities and urban centers. This

study looked at the economic and trade/consumer characteristics of the State of Wyoming (characterized as a "rural area") and the surrounding states of Montana, South Dakota, Colorado, Utah, and Idaho. Because the subject examined was economic and health service purchases of Wyoming residents, the surrounding states were included. Exhibit I-F-2 shows a map of the predominant economic-health service trade region. The size of the cities within the region are shown by representative dots of varying size.

The delineation of service areas or areasof influence was linked to consumer decisions with respect to shopping patterns and degree of consumer market orientation, and based on a hierarchy of trade patterns that were analyzed. Based on the size and level of activity exhibited by a city or town within the region, its economic-health service activities were analyzed to determine shopping patterns and dependencies. The most noteworthy feature of this study region (Wyoming) was that all of the primary and secondary trade centers are located on the fringes of the region and in other states. This is because Wyoming is predominantly a rural state and its only two major trade centers, Cheyenne and Casper, are much lower in the economic hierarchy than either the primary centers (Denver and Salt Lake City) or the secondary areas (Billings and Rapid City) nearby.

As a consequence, Wyoming residents must travel for certain of their goods and service needs. For example, Denver penetrates as far north as Casper in attracting consumers; Salt Lake City penetrates into southwestern Wyoming around Rock Springs (though it is likely some Rock Springs residents travel to Denver also) and into the area around Kemmerer. For the northern part of Wyoming, Billings, Montana, is a principal trade center (albeit a lesser one than either Denver or Salt Lake City) while Rapid City, South Dakota, attracts a share of those Wyoming consumers in the northeastern part of the state.

Within the SEPA, and for Casper the principal trade and business center, the availability of certain consumer goods depends on the market area involved.

Certain major or specialized consumer items are in relatively limited supply, including items like large appliances, furniture, specialized services, and the like. For most general consumer goods, there are adequate numbers of retail outlets providing them, though selection or price competitiveness may vary. Exhibit I-F-3 gives the comparative cost index breakdowns for cost of living items in the Casper area relative to the U. S. average and to other nearby regional centers. Notably, of the six areas examined in 1976, Casper had the second-highest overall index, second only to Billings, Montana. This gives some idea of the impact oil and coal development have had on these areas relative to other western communities. Certain categories, like Utilities and Health, are lower than in other areas; while Housing and Transportation are high indicating the relative supply to demand for these items.

By and large these findings hold significant implications to the future economic development picture in Wyoming and suggest, also, implications with regard to employment, income, and general economic activity in communities throughout the District. As future mineral development continues. however, the degree of attraction these outside trade centers currently exhibit will likely diminish to some extent, provided that the economic activity that is generated in these communities as a result of increased development is sustained. A short-term or transient growth will have little effect on these trade relationships. It is likely, moreover, that the trade patterns described here will remain for several years to come since the basic character of Wyoming, as a rural rather than urbanized state, will remain for some years to come.

FOOTNOTES

1. Wyoming DEPAD, An Economic Base Study of the Casper Area, Cheyenne, Wyoming (Draft Copy 1976).

2. Informal discussions with persons in Sheridan and Gillette, including officials at the Gillette Chamber of Commerce and the Sheridan County Planning Office.

3. Informal discussions with public offocials and private citizens in Sheridan, Gillette, and Casper indicate there is a definite need for expansion of the shopping opportunities in most of the major retail trade centers in the District, for most "major" consumer items and services. Billings, Montana, Rapid City, South Dakota, and even Denver, Colorado, are attracting significant numbers of shoppers The former two because of the greater selection and price competitiveness in shopping centers and malls easily accessible over major interstates and Denver by air only a short flight away; and

   John M. Leyes, et.al., Division of Business and Economic Research, University of Wyoming, The Delineation of Economic and Health Service Areas and the Location of Health Manpower Education Programs, November 1973.

EXHIBIT I-F-1

RETAIL AND WHOLESALE SALES TRENDS

COUNTY	No. Retail Establishments	No. Wholesale Establishments	Estimated Monthly Retail Sales, 1976[1]	Retail and Wholesale Yearly Sales Totals[2]	Sales Tax Rate
Campbell	189	10	6.2 million	$133.8 million	3%
Converse	80	10	1.4	32.2	4%
Crook	100	8	.6	11.6	3%
Goshen	38	46	2.2	39.2	3%
Johnson	64	12	1.4	22.2	3%
Natrona	610	260	15.0	364.8	4%
Niobrara	52	8	.6	9.5	3%
Platte	112	20	2.2	16.2	3%
Sheridan	198	40	8.2	72.1	3%
Weston	64	16	1.2	25.2	4%
TOTALS	1,507	430	39.0	$726.8	

COMMUNITY			Estimated Retail Sales, 1973-1974[3]
Gillette	138	8	$ 81.1 million
Douglas	80	NA	13.4
Glenrock	37	NA	7.8
Jalett	NA	NA	1.4
Moorcroft	NA	NA	4.2
Sundance	NA	NA	4.5
Torrington	38	NA	33.7
Buffalo	NA	NA	17.4
Kaycee	NA	NA	.9
Lusk	NA	NA	8.6
Chugwater	NA	NA	.6
Glendo	NA	NA	.7
Guernsey	NA	NA	4.9
Wheatland	NA	NA	13.9
Sheridan	198	40	62.5
Newcastle	NA	NA	15.8
Upton	NA	NA	4.5
Casper	NA	NA	180.0*
TOTAL			$356.4 million

NA = Not Available

1 Based upon computations from county sales tax figures.
2 From Wyoming DEPAD, Division of Industrial Development Figures.
3 Wyoming DEPAD estimates
* Estimate based on total retail-wholesale totals since no comparable data are available in the Casper area.

Source: Harbridge House, Inc., based upon information supplied by Wyoming Retail Merchants Association Casper, Wyoming (Oct. 1, 1976); and Wyoming DEPAD, Community Profiles 1976 and Economic Blueprint Component of Public Investment Plan.

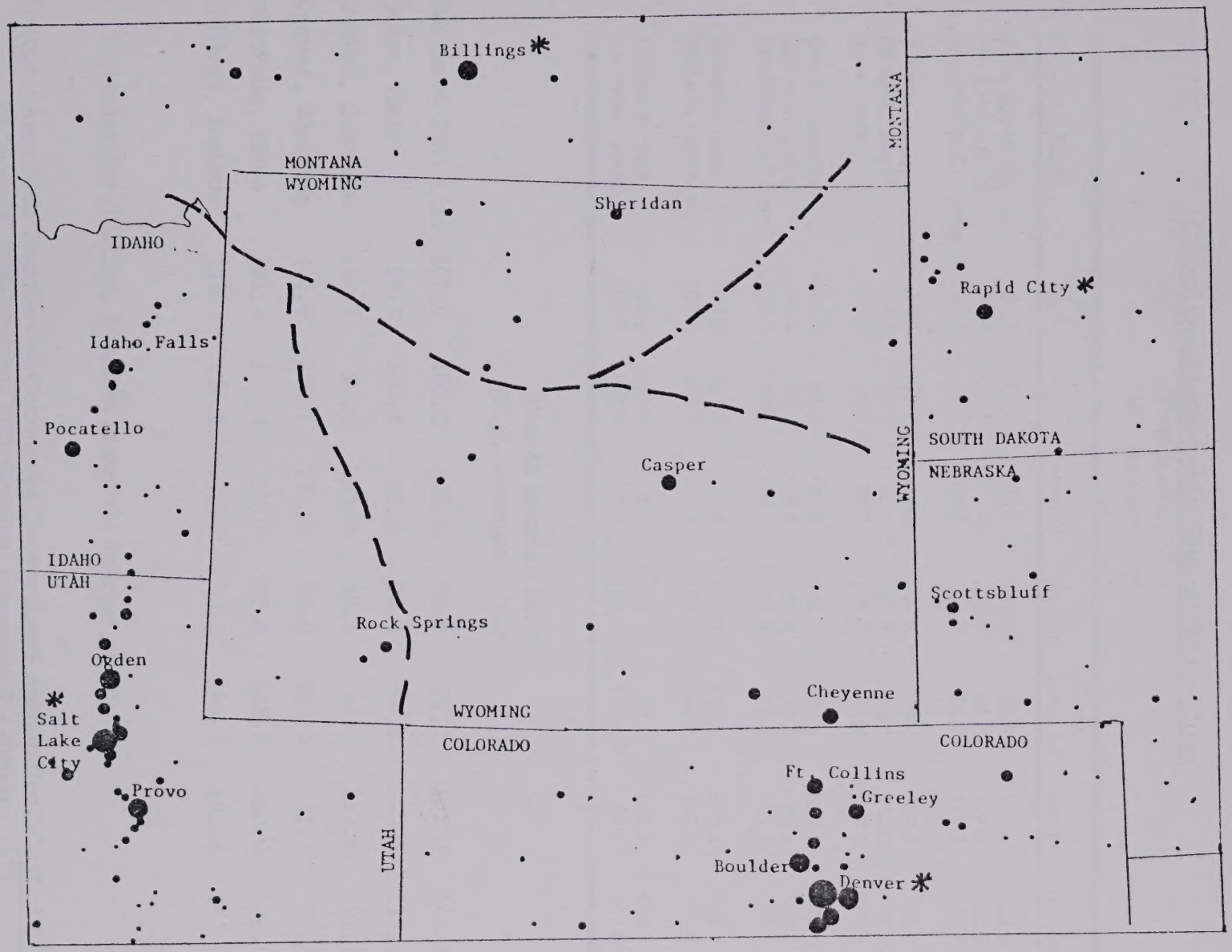

Exhibit I-F-2

MAP OF INTERMOUNTAIN STUDY REGION

— — Primary market attraction

— · — Secondary market attraction

* Principal trade centers

Exhibit I-F-3

Cost of Living Indicators for Selected Western Cities
First Quarter 1975
(U.S. Average = 100)

City and State	All items	Food	Housing	Utilities	Trans-portation	Health	Misc. services
Reno/Sparks, Nevada	95.9	96.5	85.8	82.9	96.5	126.0	125.2
Salt Lake City, Utah	96.4	94.1	107.4	73.8	91.4	104.6	95.8
Sacramento, California	97.9	91.4	105.5	61.7	106.1	118.8	118.7
Billings, Montana	98.7	92.0	126.6	56.9	89.9	89.6	95.2
Portland, Oregon	98.9	98.6	93.3	90.6	103.2	110.0	118.0
Boise, Idaho	100.0	96.1	95.7	98.2	102.8	112.7	111.9
Denver, Colorado	100.4	94.6	106.4	88.3	101.0	126.7	87.3
Casper, Wyoming	101.4	98.4	108.4	60.6	132.8	98.8	108.2
San Diego, California	103.4	89.8	118.2	81.3	94.5	121.1	108.4
Pocatello, Idaho	103.9	101.2	90.6	100.0	145.8	115.3	102.1
Spokane, Washington	105.5	103.3	107.7	93.8	106.9	122.1	104.3
Tucson, Arizona	106.2	100.8	119.9	88.1	93.4	114.3	105.1
Las Vegas, Nevada	106.7	100.9	102.5	107.7	103.4	48.7	101.8

Fourth Quarter 1976
(U.S. Average = 100)

Salt Lake City, Utah	100.0	100.7	103.3	89.3	97.1	102.4	104.2
Boise, Idaho	96.0	103.4	86.4	91.4	90.3	109.5	117.3
Denver, Colorado	100.8	98.6	108.3	82.4	88.1	119.6	107.0
Casper, Wyoming	106.6	102.3	131.2	62.5	131.6	91.4	76.8
Pocatello, Idaho	101.4	103.4	99.7	80.5	148.5	100.0	79.0
Billings, Montana[1]	112.1	108.1	135.5	93.2	90.1	102.1	105.8

[1] The index for Billings, Montana is second quarter, 1976.

Source: American Chamber of Commerce Researchers Association, Cost of Living Indicators (Washington, DC) personal interview 7 February 1977.

G. Housing

Housing data for the District is principally available from the 1970 Census, clearly an outdated source. However, in spite of this shortcoming, useful information is recorded there and, with certain more recent data that is available, comparisons can be made.

For example, Exhibit I-G-1 shows the breakdown of information for the ten counties and for the major cities and towns in each. In 1970, there were a total of over 200,000 housing units in the District of which over one-third, or almost 80,000 units, were located in municipalities. Vacancies amounted to about three percent of the total. Of the total housing units recorded, the ratio of owner-occupied to rental units was over two to one. Mobile homes in the District totaled over 5889, or about three percent (a figure that is most certainly smaller than the true number today, were it known). Median sales and rental rates for housing varied significantly, with urbanized and major development areas showing higher housing values than rural areas. Other information of interest is also recorded, although it is outdated along with most of this exhibit's figures and much of the information currently available for the District.

As an indication of the likely magnitude of recent changes in the District since 1970, certain current figures are available which can be applied. Only a very general set of updated figures (Exhibit I-G-2) compiled by the state are available; these indicate increases in total housing units in Casper, Gillette, and Sherican since 1970 of about 15 percent, 30 percent, and 8 percent, respectively.[1] Moreover, in Gillette, the only city where this data is shown, the number of mobile homes has increased from over 700 recorded in the 1970 Census to over 1000 listed currently by the state, an increase of over 40 percent. It is likely that similar increases have occurred in all parts of the SEPA and even these updated figures are likely lower than actual totals today were these available. Other studies support these increased figures and indicate the further

likely trend of expanded housing unit development, most conspicuously in mobile home and single-family units.[2] The cost of land and of providing public services will also increase as the number of new housing developments increases in response to increasing demand from people moving to the area.

More detailed and up-to-date data that is available is not uniformly developed for each county in the SEPA, but rather focuses on those areas where the issues are perceived as being greatest -- Gillette in Campbell County, Sheridan in Sheridan County, and to a lesser extent, Casper in Campbell County. Because of this lack of uniformity in the data, the material provided by selected current studies has been included as an appendix to this document. Generally speaking, however, these studies point up the lack in the data on hand for the SEPA (and for the state overall). In fact, several studies carried out by the state in this region[3] discuss this deficiency at length. It can be said, however, that growth in the SEPA has been centered in those areas where energy development activities have been occurring. And this growth is projected to continue into the future as oil and gas development gradually gives way to coal development as the principal industrial activity.

Historically, the housing market in the principal growth areas -- Gillette, Sheridan, and Casper -- has performed at a modest and steady pace, albeit a pace which has increased noticeably since 1970 and which is expected to continue to increase. Along with this increase in the number of homes, the kinds of housing that is developed is also changing. For most of the total housing stock in the SEPA, amounting to over 70,000 units in 1970, most were in single-family homes prior to 1970, while since that time this balance has shifted with mobile homes and some multi-unit developments increasing faster than single-family housing. Appendix I-G provides further details on the housing markets in Gillette and Sheridan, Wyoming.

With this trend toward in-migration of workers and resident families to the SEPA there could also be an increase in the proportion of multi-family

structures relative to single-family in the County and throughout the areas of the District expected to experience continued growth and development expansion. Currently, public authorities are calling for increased planning and regulation to meet these changing needs and provide the necessary infrastructure to deal with current capacity issues, as well as to accommodate anticipated new housing construction and development.

In studies for Sheridan County and the City of Sheridan,[4] it was shown that the annual increases in the number of building permits issued in the City since 1970 have grown from about 150 in 1970 (total valuation of $1.1 million) to almost 500 permits issued in 1975 (total valuation of $8.1 million). And, as of June 1976, the six-month total for the City was 257 permits valued at $9.3 million. While all of these permits were not for housing alone, it can be assumed that housing construction was a significant part of this overall development activity, with annual increases overall, likewise reflecting expansion of housing.

Other studies conducted in the Gillette-Campbell County area examine housing supply and demand and make recommendations relative to future development activity.[5] Housing demand in the Gillette Urban Area has grown appreciably and can be expected to increase sharply over the next 15 years.

Housing Footnotes

1. Wyoming DEPAD, Industrial Development Division, Community Profiles 1976.

2. Blevins, et. al., Social Impact Analysis of Campbell County, Wyoming, December 1974.

3. Roso, Anthony and State DEPAD, An Economic Base Study of the Casper Area, Draft,. 1976.

4. Sheridan Area Planning Agency, An Economics Study of Sheridan County, Wyoming (Preliminary Draft), June 1976; and Housing in Sheridan County, Wyoming (Preliminary Draft), June 1976.

5. Gladstone Associates, Strategies for Balanced Growth and Development 1976-1990 (June 1976) and Analysis of the Economic Base and Growth Potentials 1976-1990 (June 1976), Washington, D.C.

EXHIBIT I-G-1
HOUSING BREAKDOWNS, 1970

CASPER DISTRICT	Total Popul.	All Housing Units	Vacant Units	Popul. in Housing Units	Persons/ Unit	Owner Occupied Units	Renter Occupied Units	Median Rooms /Unit	Median Value[1] Owner Occupied	Per Month Median Value[1] Rented Units	Number of Mobile Homes & Trailers	Source of Water	
												Wells	Public
Campbell	12,957	3,951	208	12,665	3.4	2,607	1,122	4.5	$20,700	$118	1,664	1,253	2,621
Gillette	7,194	2,228	108	7,038	3.3	1,385	735	4.5	20,100	110	713	4	2,217
Converse	5,938	2,291	289	5,932	3.0	1,369	589	4.8	15,300	87	252	556	1,638
Douglas	2,677	1,068	115	2,626	2.8	645	306	4.7	14,800	68	105	7	1,039
Glenrock	1,515	514	30	NA	NA	343	116	4.6	14,000	70	NA	NA	NA
Crook	4,535	1,617	166	4,524	3.2	1,055	355	4.8	11,300	79	321	578	878
Sundance	1,056	359	15	NA	NA	250	86	4.6	13,000	76	NA	NA	NA
Goshen	10,885	4,095	347	10,651	3.0	2,347	1,260	4.9	14,000	59	157	1,763	2,155
Torrington	4,237	1,651	99	4,127	2.7	994	560	4.6	13,900	59	49	7	1,664
Johnson	5,587	2,255	276	5,516	2.9	1,268	614	4.6	16,000	81	197	465	1,580
Buffalo	3,394	1,329	98	3,371	2.8	854	379	4.7	16,000	83	61	--	1,342
Natrona	51,264	17,324	1,035	50,624	3.1	11,341	4,852	4.9	17,000	91	1,221	963	15,979
Casper	39,361	13,426	693	38,780	3.1	8,636	4,093	5.0	17,400	91	205	33	13,396
Mills	1,724	580	19	NA	NA	420	132	4.2	11,400	74	NA	NA	NA
Niobrara	29,24	1,330	255	2,940	2.7	752	323	4.6	8,600	58	68	390	911
Lusk	1,495	712	61	NA	NA	427	183	4.1	9,200	57	NA	NA	NA
Platte	6,486	2,448	193	6,426	2.9	1,601	646	5.1	11,200	72	168	811	1,615
Wheatland	2,498	973	4	NA	NA	678	264	4.5	12,400	57	NA	NA	NA
Sheridan	17,852	5,893	610	17,178	2.8	4,196	1,993	4.7	13,900	80	248	1,144	5,429
Sheridan	10,856	4,438	323	10,704	2.6	2,714	1,397	4.6	13,500	76	59	--	4,432
Weston	6,307	2,192	228	6,232	3.2	1,387	573	4.7	10,100	71	290	274	1,785
Newcastle	3,432	1,228	127	3,397	3.1	747	352	4.6	11,500	72	111	--	1,259
COUNTY TOTALS	124,735	44,396	3,607(3%)	122,688		27,923	12,327				4,586		
MUNICIPAL TOTALS	79,439	28,514	1,692(2%)	---		18,093	8,603				1,303		
ALL TOTALS	204,174	72,910	5,299(3%)	---		46,016	20,930				5,889[2]		

[1] Because of varying median values reported in the Census due to different reporting sample groups used, the figures reported varied, in some cases considerably, so that in order to reflect the most likely characteristics in the District in light of recent trends, the highest figures were sometimes used.

[2] This total is not complete due to the gaps in Census reporting and it is, significantly, this category which has shown the greatest change since 1970.

Source: U.S. Department of Commerce, Bureau of the Census, 1970 Detailed Housing Characteristics, Wyoming and 1970 General Housing Characteristics, Wyoming.

EXHIBIT I-G-2
UPDATED HOUSING DATA (1976)

County/City	No. of Housing Units	Percent Increase Since 1970	Owner Occupied Units	Rental Units	Vacancy Rate	Estimated Cost of a Home
Campbell/Gillette	2,867	28%	NA	NA	NA	$45,000
Crook/Sundance	400	11%	320	23	1%	30,000
/Moorcroft	350	-	315	32	1%	34,000
Converse/Douglas	1,560	46%	1,326	218	1%	43,500
/Glenrock	733	42%	513	212	1%	32,000
Goshen/Torrington	1,937	17%	1,162	738	1%	31,000
Johnson/Buffalo	1,403	5%	1,108	183	8%	40,000
Natrona/Casper	15,240	13%	10,668	4,267	1%	42,000
Niobrara/Lusk	715	0.4%	536	175	1%	30,000
Platte/Wheatland	1,085	11%	781	304	0%	35,000
Sheridan/Sheridan	4,800	8%	4,320	432	1%	37,000
Weston/Newcastle	1,285	4%	771	--[2]	40%	32,000
/Upton	329	--	247	49	10%	32,000
TOTAL	32,704		22,067	6,633	--	

[1] These housing values are presumed to be conservative given the general and outdated data base used.

[2] It is unlikely that no rental units exist within Newcastle, therefore, data from this source must be viewed for broad comparisons only and used with caution.

Source: Wyoming DEPAD, Industrial Development Division, Community Profiles 1976.

Appendix I-G

Gillette-Campbell County and Sheridan-Sheridan County, Wyoming

Campbell County and Gillette, Wyoming

Historically, the housing market in Gillette has performed at a modest and steady pace. Net housing demand, as indicated in Exhibit I-G-A1 has averaged approximately 200 units a year over the past 15 years.

At the end of 1975, an estimated 5000 housing units were located in Campbell County. Approximately 58 percent of these were in the City of Gillette.

As shown in Exhibit I-G-A2,a substantial shift in the housing market occurred between 1960 and 1975. In 1960, approximately 70 percent of all housing units were single family, compared to only 40 percent in 1975. This change in housing types is largely attributable to the rise of mobile home units -- some 70 percent of the net increase in housing stock over the past 15 years.

The probable distribution of demand by unit type on Exhibit G-3 reflects the experience of seven other housing markets which have been subjected to rapid expansion as a result of energy development projects. In general, it is judged that demand patterns in Exhibit I-G-A1 reflect an illustrative distribution of demand by unit type for the next five years. Thereafter, the demand patterns by unit type are likely to shift away from mobile homes -- though the precise magnitude of this change is not foreseeable at this time.

From survey materials examined, it is apparent that the Gillette urban area housing market is tight. Though there are nearly 2500 units planned or currently underway, it is likely that this condition will be experienced for at least the next two years. Incoming population and households can be expected to maintain the current residential pressure. Further, if the expected

population influx occurs within a relatively short period, severe dislocations to the housing market are likely to result.

Sheridan County and Sheridan, Wyoming

For Sheridan County, the 1976 estimate of housing units was 7446 total units (Exhibit I-G-A2). This is an increase in housing stock of over one-fifth from earlier totals, while there appeared a decrease in the number and rate of vacancies in the County. This indicates that while new housing is being developed, it is not keeping pace with the demand for housing. The City of Sheridan is the largest in the County, and makes up almost three-fourths of the total housing stock in the County. Mobile homes in the County were reported currently to be 784, or 11 percent of the total dwelling units, compared with 300 at five percent of the total in 1970. Mobile homes have increasingly become a major source of housing in the County and throughout the District.

The condition of the housing in Sheridan County and within incorporated municipalities are shown also in Exhibit I-G-A3. For the County overall, the majority of housing units, 96 percent, are up to standard quality with another two percent listed as requiring some minor repairs. Only two percent were listed as being substandard. In the City of Sheridan, similar housing quality breakdowns exist. Related to this question of housing quality in the City of Sheridan, figures available show that over half of the housing total in the City was built before 1939 and may, therefore, require some repair or rehabilitation within the near future. For the remaining municipalities in the County, most are relatively rural and small, with housing quality not a comparable concern since future demand in those areas will likely be met through new housing subdivision development or mobile home locations.

The housing market supply side factors in the region indicate that while some development of new housing is occurring in the areas examined,

factors, notably financial, are acting as constraints upon the market. Area banking institutions and their respective commercial mortgage financing policies tend to be conservative with little aggressive mortgaging being done.[1] Mortgages tend to be more readily available to finance permanent homes rather than for mobile homes. The major problems that arise are due to the inability of many borrowers to qualify for loans based upon the current conditions in these areas: housing is too expensive for many income groups to afford (even though the employment income of many of the energy-development industry workers is above average); banking policies are often very stringent and inflexible, or the relative "newness" of some banks does not allow them to aggressively serve the mortgage market; and, people cannot qualify for available subsidized loan programs whether because of high income or high housing prices.

These and related effects have made mobile homes a very attractive and readily available housing type which meets the needs of many of the recent residents to the area and will likely continue to do so. It is projected that if the numbers of mobile homes in Sheridan County continue to increase at the same rate they have been, roughly a doubling of them every five to six years, there could be over 3000 such housing types in the County by the year 2000.[2] If allowed to proliferate, this would mean about one of every four housing units could be in a mobile home given the County total housing supply projections made to the year 2000 (Exhibit I-G-A6).

Appendix I-G Footnotes

1. Gladstone Associates, Shortages for Balanced Growth and Development, 1976-1990 (June 1976); and Analysis of the Economic Base and Growth Potentials 1976-1990 (June 1976), Washington, D.C.

2. Housing in Sheridan County, Wyoming (Preliminary Draft, June 1976).

EXHIBIT I-G-A1

TRENDS IN TYPES OF DWELLING UNITS

CITY OF GILLETTE AND CAMPBELL COUNTY

1960-1975

	1960[1/]	1970	1975	Average Annual Change 1960-1970 Number	1960-1970 Percent	1970-1975 Number	1970-1975 Percent
Gillette							
Single Family Residence	980	1,074	1,317	9	1.0%	49	4.5%
Two-Family Residence	81	164	101	8	10.2%	-13	-12.5%
Multi-Family Residence	121	277	422	16	12.9%	29	10.5%
Trailers & Mobile Homes	2/	713	1,027	--	--	63	8.8%
Total	1,182	2,228	2,867	105	8.8%	128	5.7%
Campbell County							
Single Family Residence	1,504	1,782	1,992	28	1.8%	42	2.4%
Two-Family Residence	81	173	105	9	11.4%	-14	-1.3%
Multi-Family Residence	126	318	448	19	15.2%	26	8.2%
Trailers & Mobile Homes	220	1,664	2,384	144	65.6%	144	8.7%
Total	1,931	3,937	4,929	200	10.4%	198	5.0%

1/ Includes 38 seasonal housing units.

2/ Included in single family residences.

Source: U.S. Bureau of Census; Gillette-Campbell County Planning Department; and Gladstone Associates.

EXHIBIT I-G-A2

DISTRIBUTION OF DWELLING UNIT TYPES
CITY OF GILLETTE AND CAMPBELL COUNTY
1960-1975

	1960 1/		1970		1975		Change in Distribution 1960-1975
	Number	Percent	Number	Percent	Number	Percent	
Gillette							
Single Family	980	50.8%	1,074	27.3%	1,317	26.7%	-24.1%
Two-Family Residence	81	4.2%	164	4.2%	101	2.0%	- 2.2%
Multi-Family Residence	121	6.3%	277	7.0%	422	8.6%	2.3%
Trailers and Mobile Homes	2/	--	713	18.1%	1,027	20.8%	--
Subtotal	1,182	61.2%	2,228	56.6%	2,867	58.2%	- 3.0%
Campbell County							
Single Family	1,504	77.9%	1,782	45.3%	1 992	40.3%	37.6%
Two-Family Residence	81	4.2%	173	4.3%	105	21.3%	17.1%
Multi-Family Residence	126	6.5%	318	8.1%	448	9.1%	6.4%
Trailers and Mobile Homes	220	11.4%	1,668	42.3%	2,384	48.3%	36.9%
Total	1,931	100.0%	3,937	100.0%	4,929	100.0%	--

1/ Includes 38 seasonal housing units.

2/ Included in single family residences.

Source: U.S. Bureau of Census; Gillette-Campbell County Planning Department; and Gladstone Associates.

EXHIBIT I-G-A3

PROBABLE HOUSING DEMAND UNIT TYPE

THE GILLETTE URBAN AREA

1976-1980

Dwelling Type	Long Time Residents 2/	Newcomer Construction Workers	Other Newcomers 3/
Single Family	76.0%	19.1%	43.8%
Duplex, Townhouse, Condominium	1.1%	1.8%	4.9%
Apartment	4.3%	10.1%	16.1%
Mobile Home	17.7%	53.4%	31.9%
Other	0.9%	15.6%	3.3%
Total	100.0%	100.0%	100.0%

1/ Selected survey of households in Langdon, Center and Killdeer, North Dakota; Conrad, Colstrip and Forsyth, Montana; Rock Springs and Green River, Wyoming; and St. George, Utah.

2/ All residents prior to the start-up of construction activities.

3/ All households after the start-up of construction but not specifically related to construction activities.

Source: Construction Worker Profile, Old West Regional Commission, December 1975.

EXHIBIT I-G-A4

VACANCY RATE FOR HOUSING UNITS IN SHERIDAN COUNTY

Year	Total Units	Vacant Units	Vacancy Rate	%Change
1950	6645	514	7.7%	-
1960	6918	939	13.6%	+5.9%
1970	6655	633	9.5%	-4.1%
1976	7446	117	1.6%	-7.9%

Source: U. S. Department of Commerce, 1950, 1960, 1970. Census of Housing.

Sheridan Area Planning Agency, 1976. Housing Survey.

EXHIBIT I-G-A5

HOUSING CONDITION SURVEY BY HOUSING UNIT
FOR SHERIDAN COUNTY

Condition	County Grand Total			County (rural only)		
	Occupied	Vacant	Total	Occupied	Vacant	Total
Standard*	7085	18	7103	985	5	990
Minor Rehabilitation	169	6	175	15	3	18
SUBTOTAL Standard	7254	24	7278	1000	8	1008
Major Rehabilitation	55	19	74	10	10	20
Dilapidated	20	74	94	4	33	37
SUBTOTAL Substandard	75	93	168	14	43	57
TOTAL Housing Units	7329	117	7446	1014	51	1065
Vacancy Rate	1.57%			4.79%		
Mobile Homes	784	1	785	196	0	196

* Includes mobile homes.

Source: Sheridan Area Planning Agency, Housing in Sheridan County, Wyoming (Draft) June 1976.

EXHIBIT I-G-A5
con't.

	INCORPORATED TOWNS**											
	Clearmont			Dayton			Ranchester			City of Sheridan		
Condition	Occupied	Vacant	Total	Occupied	Vacant	Total	Occupied	Vacant	Total	Occupied	Vacant	Total
Standard	56	0	56	193	0	193	141	0	141	5046	9	5055
Minor Rehabilitation	3	0	3	1	0	1	6	0	6	122	3	125
SUBTOTAL Standard	59	0	59	194	0	194	147	0	147	5168	12	5180
Major Rehabilitation	3	0	3	2	2	4	0	1	1	27	6	33
Dilapidated	3	1	4	0	1	1	3	1	4	4	33	37
SUBTOTAL Substandard	6	1	7	2	3	5	3	2	5	31	39	70
Total Housing Units	65	1	66	196	3	199	150	2	152	5199	51	5250
Vacancy Rate	1.52%			1.51%			1.32%			0.97%		
Mobile Homes	18	0	18	52	0	52	40	0	40	377	1	378

**Housing units were counted in the general urban area and not just within the official city boundaries.

EXHIBIT I-G-A6

COUNTY HOUSING NEEDS BY STRUCTURE TYPE, SHERIDAN COUNTY
1980 - 2000

		STRUCTURE				
Years	Total Housing Units Required[a]	1 unit 87.1%[b]	2 unit 1.1%	3-4 unit 0.8%	5+ units 0.5%	Mobile Homes 10.5%
1980	8,188	7,106	90	57	43	892
1990	9,955	8,640	110	70	54	1,081
2000	11,870	10,301	131	83	64	1,291

Source: S.A.P.A., 1976. Housing Survey.

a. Based on Population Inclinations Table.

b. These existing percentages are applied to years; all percentages are for 1976.

H. Public Finance and Tax Base

Wyoming's assessed valuation in 1976 has increased 14.8 percent over last year to a total of $2,489,382,482. This increase was distributed almost evenly between minerals and general property as the assessed valuation of each rose by 14.75 percent and 14.84 percent, respectively (Exhibit I-H-2).

The 1976 fiscal characteristics reflect the growing public demand for coal as a major energy source. For the first time, the assessed valuation of coal reached over the $100 million mark, increasing 76 percent over 1975. Natural gas increased 37 percent since last year, followed by miscellaneous minerals with a 20 percent increase, and oil valuations were up seven percent over the previous year. Overall, minerals will account for over 48 percent of the taxable property valuations in Wyoming this year (see Exhibit I-H-1).

Last year's counties with the strongest tax base -- Campbell, Natrona, and Sweetwater -- were joined in 1976 by Park County in the over-$200 million assessed valuation category, though both Campbell and Natrona Counties had the only decreases in assessed valuation in the state this year, and Sweetwater County led the state in assessed valuation overall with a $352.4 million figure in 1976 (see Exhibit I-H-2).

However, even with the mineral industries paying nearly half of the state's property taxes, the residential property taxpayer has had ever-rising property tax bills. School and local college taxes which have traditionally led property tax increases crossed over the $100 million line to nearly $120 million in 1976 -- an increase of 19.7 percent from the previous year; but, in 1976, county taxes also increased nearly 20 percent, and municipal and special district tax increases followed closely at 17 percent and 15 percent, respectively. As a result, taxpayers in 1976 were facing increased government and living costs at double-digit rates while the Consumer Price Index showed that the rate of inflation had slowed to the single-digit figure of six percent nationwide. Because of the greater cost of providing some services

as well as heightened demand driving up the costs, the Wyoming resident is facing some very high costs of living.

The revaluation program in the state is beginning to have more significant effects throughout the state and probably accounts for much of the 14.8 percent rise in the taxable value of residential properties; but implementation of this problem has not produced any attempts to keep tax collection down. One county in the state, Natrona, has lowered its property tax revenues for this year, but otherwise, tax levies across the state are 19.5 percent higher than they were in 1975. Thus, property taxes in Wyoming have not only advanced along with assessed valuation, but have exceeded these increases by nearly five percent.

As can be seen in Exhibits I-H-6 and I-H-7 three of the counties in the District -- Campbell, Natrona, and Converse -- are among those with the highest proportion of taxable valuation and taxes contributed within the state in 1976. Campbell County is the leading county in the SEPA and the second-leading county in the state in each of these categories with 11 and 12 percent, respectively, of the taxes and valuation in Wyoming. Moreover, as Exhibit I-H-1 shows, Campbell County leads all others in Wyoming in assessed valuation of mineral production. Campbell County alone accounts for over one-fifth of the total assessed valuation for all minerals in Wyoming, and one-fourth of the total assessed valuation of the state's oil production. The total mineral assessed valuation of the ten counties which make up the District was about half of the state's total assessed mineral valuation overall and more than half of the state's total oil valuation. Coal valuation in the District was relatively minor with only Campbell and Converse Counties and Sheridan to a lesser degree showing significant coal production. Over 26.3 million barrels of oil and more than 3.8 million tons of coal were developed in Campbell County during 1976. Mineral development provides for the greatest single tax lease in the District with oil the currently predominant mineral commodity (Exhibit I-H-5). Discussions with several sources, among them the Campbell County Chamber of Commerce, indicate that expectations for the region suggest this trend of oil production dominant in the county will reverse with coal taking the lead in future years.[1]

Total taxes levied for all purposes (Exhibit I-H-8) shows schools to be the principal expenditure source. Campbell and Natrona Counties showed the highest taxes paid in the SEPA at $18 and $14 million, respectively, out of a statewide tax total of $157 million. Examination of municipal taxes shows similar trends, as school taxes predominate, amounting to about 70 percent of the total tax levy (Exhibit I-H-4).

For the counties and for individual municipalities, a principal source of revenue is the optional one percent sales tax (See Section F, Consumption and Investment Patterns) at the county level. For example, in the City of Casper for fiscal year 1975-1976, the sales tax was a source of over one-fifth of municipal revenues which totalled $12.2 million.[2] In Sheridan County, retail trade was consistently the source of the highest tax revenues amounting to over half of all sales and user tax collections in the county.[3]

Clearly, the need for revenue sources that can keep up with the expenditure needs of counties and municipalities is of major concern in the SEPA and throughout the state. In many cases, public service needs outpace revenues and the imbalance created places great strain on the existing government and public service structure of a county and of a community. Such imbalances are now expected in a "boom" community environment as is occurring in parts of the SEPA. A notable example of such an imbalance has been occurring in Gillette-Campbell County as a result of the effects of mineral development there upon the relationship between local and county government. According to a study carried out in Gillette,[4] the fiscal pressures that are coming to bear on the community are due to the historical and recent trends whereby revenues in the County, particularly those from mineral lands and development taxes, have increased at a faster rate relative to those in Gillette, while expenditure pressures related to public services (principally for water, sewer, and public safety) are increasing in Gillette where most new residents are settling. Simply stated, the County is developing and growing while the city bears the pressure of accommodating that growth. The fiscal imbalance between these

two jurisdictions is a primary focus of several studies currently underway in the area and similar issues will arise in other communities where rapid growth and the resultant pressures are occurring. As a further example of the problems being encountered, the City of Sheridan is experiencing similar pressures from growth, however, there the mineral activity is occurring in nearby Montana to the north so that the city and county must bear the burden of public services and other community needs with none of the benefits. These problems illustrate the magnitude of the current concern in these areas, even though overall economic benefits have been generally forecast to occur. The critical question is: At whose expense are benefits to be derived; and, what will be the long-term balance between positive and desirable growth in a community and the less desirable aspects of a "booming" economy? The answers to these questions are not solely within the purvue of this SEP, however, in examining some of these issues, BLM will be helping to determine ways to deal more effectively with the problems that may result.

FOOTNOTES

1. Interview and discussion with Mr. David Bell, head of the Gillette-Campbell County Chamber of Commerce, Gillette, Wyoming, December 1976.

2. William Peterson, An Economic Analysis of Natrona County, Wyoming, December 1975.

3. Sheridan Area Planning Agency, An Economic Study of Sheridan County (Preliminary Draft) June 1976.

4. Gladstone Associates, Washington, D. C., Strategies for Balanced Growth and Development 1976-1990, June 1976.

Exhibit I-H-1

1976 ASSESSED VALUATION OF MINERAL PRODUCTION SUBJECT TO SEVERANCE TAXATION

County	Oil	Natural Gas	Coal	Miscellaneous Mineral	TOTAL MINERALS
Albany	$ 1,352,364	$ - 0 -	$ - 0 -	$ 431,948	$ 1,784,312
Big Horn	50,541,744	277,298	- 0 -	2,056,784	52,875,826
Campbell	219,382,296	13,473,022	8,899,319	4,000	241,758,637
Carbon	7,445,824	3,373,990	75,397,726	7,348,077	93,565,617
Converse	106,860,634	6,996,895	6,944,007	2,654,842	123,456,378
Crook	21,771,733	30,209	- 0 -	2,654,578	24,456,520
Fremont	35,995,261	11,197,744	- 0 -	23,427,755	70,620,760
Goshen	100,396	- 0 -	- 0 -	21,355	121,751
Hot Springs	57,725,554	10,052	28,670	12,677	57,776,953
Johnson	25,931,471	215,218	- 0 -	401,597	26,548,289
Laramie	1,629,159	- 0 -	- 0 -	1,666,968	3,296,127
Lincoln	1,663,138	3,351,421	18,004,991	1,241,747	24,261,297
Natrona	71,846,611	1,343,216	- 0 -	721,309	73,911,136
Niobrara	6,085,028	42,736	- 0 -	- 0 -	6,127,824
Park	165,517,145	3,068,664	- 0 -	228,145	168,813,954
Platte	25,713	- 0 -	- 0 -	3,133,031	3,158,744
Sheridan	882,700	- 0 -	4,858,835	81,230	5,822,765
Sublette	28,266,971	14,593,667	- 0 -	4,587	42,865,225
Sweetwater	57,562,365	28,296,469	10,522,768	44,487,663	140,869,265
Teton	- 0 -	- 0 -	- 0 -	174,302	174,302
Uinta	115,815	1,097,879	- 0 -	53,473	1,267,167
Washakie	10,279,838	1,295,575	- 0 -	277,033	11,852,446
Weston	23,065,355	197,843	- 0 -	277,803	23,541,001
1976 TOTAL	$ 894,047,178	$ 88,861,898	$ 124,656,316	$ 91,360,904	$1,198,926,296
1975 TOTAL	833,099,266	65,041,856	70,658,473	75,997,498	1,044,797,093
INCREASE (DECREASE)	$ 60,947,912	$ 23,820,042	$ 53,997,843	$ 15,363,406	$ 154,129,203

Source: Wyoming Taxpayers Association, Wyoming Property Tax Rates, 1976, Cheyenne, Wyoming.

EXHIBIT I-H-2

TOTAL ASSESSED VALUATION, BY COUNTY
1975 and 1976
($ millions)

COUNTY	1976 Valuation	1975 Valuation	% Change
Campbell	$ 304.7	$ 322.4	(5.5) %
Converse	191.5	128.4	49.1 %
Crook	46.4	42.8	8.4 %
Goshen	37.8	33.2	13.5 %
Johnson	54.8	43.0	27.5 %
Natrona	207.7	213.4	(2.7) %
Niobrara	22.6	19.4	16.1 %
Platte	31.4	28.1	11.4 %
Sheridan	54.3	37.0	15.4 %
Weston	47.1	42.1	11.9 %
DISTRICT TOTAL	998.3	919.8	8.5 %
WYOMING TOTAL	2,489.4	2,168.5	14.8 %

Source: Wyoming Taxpayers' Association, Wyoming Property Tax Rates, 1976, Cheyenne, Wyoming.

Exhibit I-H-3

COMPARATIVE VALUATIONS

COUNTY	Total Lands	Total Livestock	Total Minerals	Total Taxable Property[1]
Campbell	$ 7.7	$ 3.8	$ 241.8	$ 259.6
Converse	6.6	3.0	123.5	163.4
Crook	5.5	2.9	24.5	27.8
Goshen	8.4	2.7	.1	5.7
Johnson	6.1	3.2	26.6	29.7
Natrona	5.8	2.5	73.9	95.6
Niobrara	4.9	2.7	6.1	8.2
Platte	5.3	2.3	3.2	12.0
Sheridan	5.9	3.0	5.8	13.2
Weston	3.4	1.8	23.5	29.6
DISTRICT TOTAL	59.6	27.9	529.0	644.8
WYOMING	$114.9	$53.3	$1,198.9	$1,603.9

[1] Assessed by the Wyoming State Board of Equalization

Source: Wyoming Department of Revenue and Taxation, Ad Valorem Tax Division, 1976 Annual Report.

Exhibit I-H-4

MUNICIPAL TAX LEVIES 1976

County/City	Municipal Valuation	County Tax Levy	School Tax Levy	Municipal Tax Levy	Total Tax Levy
Campbell/Gillette	$13.5	$ 198,323	$ 607,231	$ 101,275	$ 906,829
Converse/Douglas	6.1	66,866	270,347	141,042	478,255
Crook/Sundance	1.7	19,825	74,597	24,670	119,092
Goshen/Torrington	8.3	118,455	422,152	81,490	622,097
Johnson/Buffalo	5.1	61,340	204,631	88,377	354,348
Natrona/Casper	77.0	963,001	4,056,162	616,321	5,635,484
Niobrara/Lusk	2.9	35,531	119,153	23,357	178,041
Platte/Wheatland	4.8	54,807	228,890	4,807	288,504
Sheridan/Sheridan	21.8	280,328	1,194,212	255,787	1,730,327
Weston/Newcastle	3.8	45,900	240,320	65,559	351,779
TOTALS (Approx.)		$1,844,000 (17%)	$7,418,000 (70%)	$1,402,000 (13%)	$10,665,000

Source: Wyoming Department of Revenue and Taxation, Ad Valorem Tax Division, 1976 Annual Report.

Exhibit I-H-5

DETAILED STATEMENT OF VALUATIONS FOR THE YEAR 1976

County	Miscellaneous Minerals	Coal Production		Oil Production		Natural Gas Production	
		Tons	Valuation	Barrels	Valuation	MCF	Valuation
Albany	431,948	--	$ --	201,517	$ 1,352,364	--	$ --
Big Horn	2,056,784	--	--	6,712,645	50,541,744	1,206,739	277,298
Campbell	4,000	3,816,805	8,899,319	26,361,463	219,382,296	27,788,670	13,473,022
Carbon	7,348,077	10,830,813	75,397,726	1,186,009	7,445,824	12,414,296	3,373,990
Converse	2,654,842	3,018,342	6,944,007	9,093,178	106,860,634	11,723,075	6,996,895
Crook	2,654,578	--	--	3,068,400	21,771,733	110,931	30,209
Fremont	23,427,755	--	--	6,804,091	35,995,261	38,629,979	11,197,744
Goshen	21,355	--	--	7,634	100,396	--	--
Hot Springs	12,677	3,978	28,670	8,896,667	57,725,554	196,685	10,052
Johnson	401,597	--	--	3,581,752	25,931,474	1,226,689	215,218
Laramie	1,666,968	--	--	241,799	1,629,159	--	--
Lincoln	1,241,747	2,728,029	18,004,991	188,924	1,663,138	7,714,086	3,351,421
Natrona	721,309	--	--	11,054,404	71,846,611	7,020,374	1,343,216
Niobrara	--	--	--	627,919	6,085,088	334,048	42,736
Park	228,145	--	--	27,357,841	165,517,145	9,085,234	3,068,664
Platte	3,133,031	--	--	2,018	25,713	--	--
Sheridan	81,230	805,247	4,858,835	163,945	882,700	--	--
Sublette	4,587	--	--	3,397,292	28,266,971	44,909,382	14,593,667
Sweetwater	44,487,663	1,937,891	10,522,768	7,556,204	57,562,365	73,021,606	28,296,469
Teton	174,302	--	--	--	--	--	--
Uinta	53,473	--	--	11,039	115,815	3,636,377	1,097,879
Washakie	277,033	--	--	1,715,369	10,279,838	9,104,538	1,295,575
Weston	277,803	--	--	2,399,841	23,065,355	406,172	197,843
Totals	91,360,904	23,141,105	$124,656,316	120,629,951	$894,047,178	248,528,881	$88,861,898

Source: State of Wyoming, 1976 Annual Report, Department of Revenue and Taxation, Ad Valorem Tax Division, Cheyenne, Wyoming

Exhibit I-H-6

PROPORTION OF ALL TAXES CONTRIBUTED BY EACH COUNTY FOR THE YEAR 1976

1.	Sweetwater	15.20%
2.	Campbell	11.67%
3.	Natrona	9.06%
4.	Park	8.34%
5.	Laramie	7.14%
6.	Converse	7.05%
7.	Fremont	6.44%
8.	Carbon	6.23%
9.	Lincoln	3.46%
10.	Big Horn	3.20%
11.	Albany	2.58%
12.	Sheridan	2.45%
13.	Hot Springs	2.25%
14.	Sublette	2.18%
15.	Johnson	1.88%
16.	Weston	1.79%
17.	Crook	1.69%
18.	Goshen	1.67%
19.	Washakie	1.31%
20.	Uinta	1.27%
21.	Platte	1.19%
22.	Teton	1.16%
23.	Niobrara	.79%
		100.00%

Exhibit I-H-7

PROPORTION OF TAXABLE VALUATION CONTRIBUTED BY EACH COUNTY FOR THE YEAR 1976

1.	Sweetwater	14.15%
2.	Campbell	12.24%
3.	Park	8.84%
4.	Natrona	8.34%
5.	Converse	7.69%
6.	Carbon	6.54%
7.	Laramie	5.92%
8.	Fremont	5.84%
9.	Lincoln	3.64%
10.	Big Horn	3.20%
11.	Hot Springs	2.98%
12.	Albany	2.60%
13.	Sublette	2.50%
14.	Johnson	2.20%
15.	Sheridan	2.18%
16.	Weston	1.89%
17.	Crook	1.86%
18.	Goshen	1.52%
19.	Washakie	1.36%
20.	Platte	1.26%
21.	Uinta	1.17%
22.	Teton	1.17%
23.	Niobrara	.91%
		100.00%

Source: 1976 Annual Report, Wyoming Department of Taxation and Revenues, Cheyenne, Wyoming

Exhibit I-H-8

TABLE VI STATEMENT SHOWING TAXES LEVIED FOR ALL PURPOSES FOR 1976

County	State General Fund	Foundation Program Fund	County Taxes***	Special District *	School Taxes **	Municipal Taxes	Total Taxes
Albany	None	$ 210,303	$ 790,998	$ 257,699	$ 2,484,550	$ 296,591	$ 4,040,141
Big Horn	None	258,548	946,681	466,844	3,213,810	122,019	2,533,806
Campbell	None	990,404	4,017,078	460,866	12,713,436	101,275	18,283,059
Carbon	None	528,924	1,901,845	13,459	7,034,533	288,282	9,767,043
Converse	None	622,382	2,091,587	214,322	7,953,906	161,315	11,043,512
Crook	None	150,800	547,475	--	1,909,224	37,428	2,644,927
Fremont	None	472,181	1,843,687	187,512	7,307,438	278,149	10,088,967
Goshen	None	122,677	539,478	65,019	1,801,254	93,684	2,622,112
Hot Springs	None	240,934	837,262	49,002	2,338,911	60,266	3,526,375
Johnson	None	177,950	636,239	33,674	2,006,837	90,578	2,945,278
Laramie	None	479,144	1,598,131	104,076	8,255,603	756,663	11,193,617
Lincoln	None	294,414	760,947	511,211	3,733,354	122,675	5,422,601
Natrona	None	675,107	2,388,840	307,912	10,174,768	645,840	14,192,467
Niobrara	None	73,291	274,446	15,653	847,063	24,358	1,234,811
Park	None	715,404	1,619,674	1,279,808	9,338,151	108,272	13,061,309
Platte	None	101,903	357,444	9,745	1,378,208	21,204	1,868,504
Sheridan	None	176,338	698,513	17,855	2,685,386	265,147	3,843,239
Sublette	None	202,224	569,775	41,190	5,007,902	62,766	3,409,761
Sweetwater	None	1,145,184	4,644,162	15,251	17,708,508	309,889	23,822,994
Teton	None	94,453	267,667	103,369	1,268,582	79,924	1,813,995
Uinta	None	94,767	424,557	2,470	1,356,595	106,658	1,985,047
Washakie	None	109,961	371,972	52,002	1,433,737	91,157	2,058,829
Weston	None	153,199	449,604	--	2,126,411	75,060	2,804,274
TOTALS		$ 8,090,492	$ 28,578,062	$ 4,208,939	$111,604,071	$4,199,200	$156,680,764

* Includes Fire, Hospital, Cemetery, Sanitation, Recreation, Conservancy, Water & Sewer & Health Districts
** Includes County School Taxes
*** Includes Weed & Pest Districts

Source: State of Wyoming, 1976 Annual Report, Department of Revenues And Taxation, Ad Valorem Tax Division, Cheyenne, WY.

I. Land Ownership and Use

Land ownership and use in the Casper District addressed the usage patterns and ownership of lands in the ten counties that make up the District area. As shown in Exhibit I-I-1, the total land area in the SEPA amounts to about 21.3 million acres. There are, in addition, some 58,000 acres of water surface in the District. Of this total land area, roughly one-fifth or about 4.3 million acres, is under Federal ownership and control (Exhibits I-I-1 and I-I-2). Significant portions of Natrona, Johnson and Sheridan Counties are under the jurisdiction and control of key Federal agencies, including BLM, the U. S. Forest Service, and the Bureau of Reclamation. A small portion of the lands within the District are administered by various state and local agencies, while the remainder, almost 70 percent, are privately owned.

For all of the counties within the District, at least half of all land is privately owned. Natrona County shows the smallest percentage of private land with over 45 percent, while Campbell, Niobrara, and Platte Counties each have over 80 percent of their lands privately owned, and Goshen County has over 90 percent of its land under private control.

Of the total lands in the District, BLM controls about one-eighth or more than 2.7 million acres. The U. S. Forest Service owns another 1.5 million acres throughout the District. Of the total federally owned land in the District, BLM accounts for more than 60 percent (Exhibit I-I-5). It likewise accounts for at least half of all Federal lands in most counties with the exception of Converse, Crook, Sheridan, and Weston Counties. In these counties the U. S. Forest Service controls the major share of public lands.

In each of the counties, incorporated land within cities and towns amounts to less than half of one percent of total land area (Exhibit I-I-3). It is interesting to note, further, that within most municipalities considerable amounts of land are undeveloped, in some cases by as much as half or more of all municipal land. Even though new development is likely to occur on these vacant lands within city limits, the extent of urbanized land is not likely to alter dramatically in comparison to the rest of the land area within the SEPA.

Most development and land use activity in the District are focused in the major municipalities. Casper is the principal city in the region and also serves as the major retail and commercial trade center. It is fast becoming a major regional industrial center, as well.[1] A secondary development and growth center in the District is in the northern sector around the communities of Gillette and Sheridan. There, coal development and oil/gas production are the cornerstones of that area's rapid growth. Douglas, in Converse County, and the area around Buffalo in Johnson County, are likewise experiencing greater growth and development activity.

In spite of the recent energy-related growth that has occurred in parts of the SEPA, agriculture is clearly the predominant land use activity in the District overall and within most of the individual counties. The major single use of private land in the District is for grazing (Exhibit I-I-4). Fully, two-thirds of all lands in the District are designated as private grazing lands, with the additional grazing activities of BLM National Resource Lands adding to this total. When all agricultural land uses are combined, they encompass 98 percent of all private land and 69 percent of the total land area in the District. Exhibit I-I-4 shows this relationship as it breaks down land use activities by county and shows the relative importance to each area of farming, grazing, timber, minerals, and urbanized land uses on private lands. Significantly, dry farmlands out-number irrigated lands in area for the District overall, though this trend varies in each county. Timber lands are relatively minor, although in Weston County, upwards of 20,000 acres are so designated. It is important to note, also, that urbanized land uses comprising municipal and suburban lands are a significant element in the District's land use pattern. Casper and the surrounding area of Natrona County is by far the most urbanized area in the District. With over 14,700 suburban acres and 6200 municipal acres the "metropolitan" Casper area is a strong focus and attraction for development of all types. Housing is clearly one of the most important among

the community's land uses. Both Sheridan and Gillette, in Sheridan and Campbell Counties, respectively, are likewise experiencing growth and development with each showing over 7000 acres of urban-suburban land area. As these areas become more densely concentrated, the development pressures upon outlying lands will increase, accompanied by increases in land values and development costs. The current acreage within urban-suburban areas, totalling more than 54,000 acres, will likely continue to increase over the coming years. Because of lower land costs and fewer restrictions to development existing outside of municipal areas, new development will focus particularly on the suburban land areas.

Currently, within the Casper District SEPA, Natrona County is the largest and most densely developed area with the largest city, Casper, located there. Because of its size and importance as a regional trade center, Casper has in the past experienced growth and development with further increases in most sectors of the local economy likely.[2] As this growth occurs, pressures on land -- for housing, mineral development and related industries, and recreation -- will also increase altering the existing land use patterns and ownership status. Moreover, the potential conflicts between competing land uses, particularly those between residential, agricultural, mineral development, and recreational activites, are more likely to become intensified.

Campbell County to the north and Gillette, Wyoming, its leading city, is the second-largest area in the District (although it is growing the fastest) and it is experiencing similar growth and development pressures. As the geographic focal point for Wyoming's energy-related activities in the Power River Basin, Gillette serves also as the county seat and retail trade center for that region. As existing coal development and anticipated future mineral and power development activities occur in that area, land use patterns will be altered dramatically in order to accommodate and serve the expected numbers of new residents to the area. Sheridan, Wyoming, to the west is another trade center and regional urbanized area with a strong tradition as an attractive area to settle and it is thought by some to be more attractive to consumers

than Gillette.[3] Land use patterns in Sheridan are also likely to experience change as pressures on land, principally residential development and recreational activities, increase with expanded mineral activities in the region.

At present, the land ownership and use data available offer useful information on land patterns in the District and recent studies have and will continue to update this information further. However, significant gaps and contradictions still exist in many areas of information. Two major issues are important. First, most of the data available, both past and recent, tends to offer contradicting land area figures. For example, the land area figures for counties as shown in Exhibit I-I-1 vary considerably from those in Exhibit I-I-4 as noted according to the sources used. It is likely that some of these variations are a result of different reporting and tabulation procedures or of outdated information and it should be pointed out also that the discrepancies in county and BLM land totals are in most cases relatively minor. Nonetheless, these data discrepancies (notably those from state sources) can confuse and hinder future analysis efforts. To the extent that updated information becomes available, it should be applied wherever possible.

A second area of data vagaries lies in the breakdowns of land use patterns and municipal land usage acreage. No reliable source has, to date,[4] been uncovered which clearly and uniformly breaks down land usage and activities by county and/or municipality. The information presented here is based on several available sources assembled in a compatible fashion, however, the primary and most reliable source, the 1976 Annual Report of the State Ad Valorem Tax Division, was not suited in every category for this breakdown. Some municipalities and sub-county areas do have information on land use, notably housing, and new studies are in various stages of completion.[5] As the counties become more involved in planning to accommodate recent and projected growth and development, the information base for the District will expand.

Another aspect of land ownership/usage is based on the extensive holdings of federal agencies relative to mineral ownership. BLM is the principal holder of subsurface mineral rights to lands in the SEPA encompassing over 8.4 million acres of land. Exhibit I-I-7 lists the extent of these subsurface rights for each county within the SEPA. As can be seen, Campbell County has the largest single share of these mineral rights with about one-fourth of the total. For all of the SEPA counties, the development of these mineral resources will depend on much larger economic and policy considerations than can be examined in this document, however, it is likely that if and when these lands become available for exploration and lease, they will hold significant implications for the future land use patterns in the SEPA. Given the current level of mineral development activity in the area and the resultant range of impacts associated with this activity, it is clear that any future leasing of lands by the Federal Government must consider the existing and available land use infrastructure within a given county and within the SEPA overall and its capacity to accommodate such activity.

FOOTNOTES

1. See the discussion of Employment and Consumption/Investment Patterns elsewhere in this report.

2. William Peterson, Natrona County Planning Department, An Economic Analysis of Natrona County, Wyoming, December 1975. In this analysis, Mr. Peterson analyzes various aspects of the local and regional economy. His general conclusions are that while growth in the mineral industry has been rapid and intense, other sectors of the economy including services and housing, while linked to mineral industry activity, are experiencing more stable growth. Taken together, these economic forces appear to indicate continued growth and development activity with resultant expansion of the land use base in the area.

3. Discussions with Gillette Chamber of Commerce and Sheridan County Planning Office, 7 and 8 December 1976. The Sheridan retail district is thought to be more "appealing" to shoppers because of its better layout and orientation and, in fact, there is a greater variety and selection in Sheridan's stores. However, many shoppers still travel to Billings, Montana to the north or Rapid City-Spearfish, South Dakota to the east where major purchases and some service needs are thought to be better met. Good access along major Interstates and thoroghfares plus the attractions of new mall shopping centers continue to draw consumers to these centers outside of Wyoming. Further discussion of this can be found in the section on Consumer and Retail Trade.

4. Because this study ran from October to December 1976 there were necessary limitations placed upon the data collection effort. Most data sources utilized were those already published or otherwise readily available. In certain instances unconfirmed or conflicting data was verified, notably figures of BLM land area and certain county figures, however, in most cases the available data was simply outdated, incomplete or, worse, erroneous. This study has attempted to distingush between these vagaries in the data and, where possible, provide useful compilations and updates of information. Moreover, during the course of the data collection effort various studies and reports forthcoming at a later date were uncovered. These too have been identified in the text (and in the Annotated Bibliography) and it is hoped that these sources can be incorporated into this report upon publication.

5. Studies in Sheridan County and Campbell County are expected in the coming months.

EXHIBIT I-1-1

LAND OWNERSHIP BY COUNTY (AREA IN ACRES)

COUNTY	Total Area	Water Surface	Land Area	Federal Ownership	% of Total	State & Local	% of Total	Private Ownership	% of Total
CASPER DISTRICT									
Sheridan	1,620,480	000	1,620,480	453,480	28.0%	139,290	8.6%	1,027,710	63.4%
Cambell	3,043,840	320	3,043,520	383,240	12.6	219,460	7.2	2,440,820	80.2
Crook	1,854,080	9,730	1,844,350	287,890	15.6	155,290	8.4	1,401,170	76.0
Johnson	2,674,560	2,690	2,671,870	836,300	31.3	242,730	9.1	1,592,840	59.6
Weston	1,541,120	700	1,540,420	303,690	19.7	165,840	10.8	1,070,890	69.5
Natrona	3,436,160	17,090	3,419,070	1,319,060	38.6	551,560	16.1	1,548,450	45.3
Converse	2,741,120	900	2,740,220	370,010	13.5	332,310	12.1	2,037,140	74.4
Niobrara	1,672,960	000	1,672,960	161,040	9.6	134,780	8.1	1,075,620	82.3
Platte	1,357,440	22,530	1,334,910	117,300	8.8	141,990	10.6	1,294,280	80.6
Goshen	1,430,400	4,420	1,425,980	28,870	2.0	102,830	7.0		91.0
TOTAL	21,372,160	58,380	21,313,780	4,260,880	19.9%	2,186,080	10.2%	14,866,820	69.6%

Source: An Outdoor Recreation Plan for Wyoming, The Wyoming Recreation Commission, Cheyenne, Wyoming, June 1975 (pp. 9.3-9.11); and The Wyoming Framework Water Plan, State Engineer's Office, Wyoming Water Planning Program: May 1973 (pp. 12-14).

EXHIBIT I-12

LAND OWNERSHIP BREAKDOWN BY COUNTY
1970

County	Total All Lands	BLM (NRL)	Percent	Forest Service	Percent	All Other Includes Private, State/Local/Federal	Percent
CASPER DISTRICT							
Sheridan	1,620,480	50,477	3%	394,562	24%	1,175,441	73%
Cambell	3,043,840	223,318	7	158,005	6	2,662,517	87
Crook	1,844,480	101,197	5	168,531	9	1,574,752	86
Johnson	2,672,000	537,688	20	326,875	12	1,807,437	68
Weston	1,540,480	78,684	5	233,969	15	1,227,827	80
Natrona	3,418,880	1,372,364	40	5,615	0	2,040,901	60
Converse	2,739,840	127,905	5	260,621	10	2,351,314	85
Niobrara	1,672,960	159,664	10	840	0	1,512,456	90
Platte	1,335,040	83,244	6	1,142	0	1,250,654	94
Goshen	1,425,920	23,374	2	---	--	1,402,546	98
TOTAL	21,313,920	2,757,915	13%	1,550,160	7%	17,005,845	80%

Source: BLM Office of Denver Federal Center, computer data summaries for land holdings by county, November 1976.

EXHIBIT I-I-3

ACREAGE IN MAJOR MUNICIPALITIES

County/City	Acreage Within City Limits	City Acreage Still Undeveloped	Percent of City
Sheridan/Sheridan	2,600	160	6%
Cambell/Gillette	3,200	960	30
Crook/Sundance	400	20	5
/Moorcraft	640	429	67
Johnson/Buffalo	850	42	5
Weston/Upton	1,000	400	40
/Newcastle	836	167	20
Natrona/Casper	6,221	662	11
Converse/Douglas	2,500	500	20
/Glenrock	450	90	20
Niobrara/Lusk	640	288	45
Platte/Wheatland	834	475	57
Goshen/Torrington	819	49	6
TOTAL	20,990	4,200	20%

Source: Wyoming DEPAD, Industrial Development Division, Community Profiles 1976.

EXHIBIT I-I-4

LAND USE BY COUNTY, 1975[1] (AREA IN ACRES)

COUNTY CASPER DISTRICT	Irrigated Farmlands	Irrigated Pasture	Developed Farmlands	Uncultivated Lands (w/water rights)	Grazing Lands	Timber Lands	Waste & Bog Land	Exempt[2] Mineral Land	Suburban[3] Lands	Other[4] Lands	Major Municipal Lands[5]	Total Of[6] Private Lands
Sheridan	50,491	15,635	39,030	5,357	904,991	---	2,212	---	4,847	442	2,600	1,025,605
Cambell	---	3,088	22,408	---	2,314,583	---	---	---	3,990	---	3,200	2,347,269
Crook	1,452	2,458	86,463	22,737	1,247,528	32,495	3,811	9,160	1,661	---	1,040	1,408,805
Johnson	33,504	8,227	7,360	16,905	1,518,505	---	393	7,120	3,216	---	850	1,596,080
Weston	1,996	21,626	19,353	70	1,026,342	1,260	---	20,063	1,246	---	1,836	1,093,792
Natrona	18,783	2,442	1,416	7,083	1,480,434	---	---	---	14,765	9,468	6,221	1,540,612
Converse	22,634	7,142	8,133	6,600	1,952,647	6	904	---	2,103	---	2,950	2,003,119
Niobrara	12,497	8,008	39,373	---	1,313,797	---	2,536	3,781	719	---	640	1,381,351
Platte	50,029	12,543	95,611	11,718	901,856	---	1,970	320	1,043	---	834	1,075,924
Goshen	100,227	6,750	177,213	13,573	995,182	---	---	---	50	---	819	1,293,814
TOTAL	291,613	87,919	496,360	84,043	13,555,865	33,761	11,826	40,444	33,640	9,910	20,990	14,766,371

[1] Based upon 1976 Annual Report, State of Wyoming Department of Revenue and Taxation, Ad Valorem Tax Division for non-public lands in each county.

[2] Includes only those mineral lands (active) or private property whose mineral production is taxed in lieu of a land tax -- a 40-acre exemption per mineral producing unit is allowed for these lands.

[3] Includes non-farm lands outside of incorporated cities and towns.

[4] Includes non-classified lands such as cabin sites.

[5] Wyoming DEPAD, Industrial Development Division, Community Profiles 1976, See Table I-3.

[6] These totals are based upon a compilation of figures from several data sources. As a result these figures presented are not complete and should, in fact, be cosidered "conservative" estimates ofprivate land ownership. Since discrepancies exist between various reporting procedures for private lands, those totals do not correspond exactly to those totals in Table I-1.

Source: Harbridge House, Inc., based upon personal interview with Mr. Merrill Ainsworth, Assistant Director, State of Wyoming, Department of Revenue and Taxation, Ad Valorem Tax Division, 2 December 1976, 23 December 1976, and 4 January 1977; and State of Wyoming, 1976 Annual Report, Department of Revenue and Taxation, Ad Valorem Tax Division (pp. 1-5).

EXHIBIT I-I-5

FEDERAL OWNERSHIP OF LAND IN WYOMING
1970 (in acres)

County	BLM	US Forest Service	BuRec.	National Park Service	Other Federal Agencies	Grand Total
Goshen	23,534	--	630	563	2,526	27,253
Platte	83,244	1,142	29,323	--	2,241	115,950
Converse	127,905	260,621	1,488	--	1,057	391,071
Natrona	1,371,718	5,615	26,879	--	12,702	1,416,914
Niobrara	159,664	840	11	--	--	160,515
Campbell	223,318	158,005	3,031	--	--	384,354
Crook	101,197	166,471	16,134	1,347	1,452	286,601
Johnson	537,688	326,875	---	--	--	864,563
Sheridan	50,437	394,562	825	--	4,863	450,687
Weston	78,684	233,744	---	--	--	312,428
Total SEPA	2,757,389	1,547,875	78,331	1,910	24,841	4,410,336
Total STATE	17,423,262	9,242,951	946,550	2,381,675	83,202	30,077,640

Source: An Outdoor Recreation Plan for Wyoming, The Wyoming Recreation Commission, Cheyenne, Wyoming: June 1975 (pp. 9.4).

BLM Library
Denver Federal Center
Bldg. 85, OC-521
P.O. Box 25047
Denver, CO 80225

EXHIBIT I-I-6

BUREAU OF LAND MANAGEMENT NATIONAL RESOURCE LANDS BY REGION AND COUNTY June 30, 1973
(in acres)

Region & County	NRL Open	NRL Reserved[1]	Total NRL	Region Area Total	NRL as % of Region Area
Goshen	24,798	---	24,798		
Platte	78,489	---	78,489	11,860,030	21.34%[2]
Converse	128,571	---	128,571		
Natrona	1,372,103	2,756	1,374,869		
Niobrara	124,408	---	124,408	7,850,240	20.74%
Campbell	226,786	1,080	226,866		
Crook	93,296	---	93,295		
Johnson	496,151	---	496,151		
Sheridan	49,385	---	49,385		
Weston	76,824	8,795	85,619	10,734,080	8.86%
SEPA Totals	2,669,810	12,631	2,682,441		
TOTALS	14,173,016	3,372,150	17,545,166[3]	60,150,580	29.17%

1. Reserved lands are dedicated or set aside for a specific public purpose.
2. Based on five-county totals for Region 1 of which only Goshen and Platte Counties are within the SEPA.
3. Does not include: 640 acres in Kansas and 3,690 acres in Nebraska administered by Casper District; and 421,397 acres under other federal control, but totally or partially administered by BLM

Source: An Outdoor Recreation Plan for Wyoming, The Wyoming Recreation Commission, Cheyenne, Wyoming: June 1975 (pp. 9.11).

EXHIBIT I-I-7

FEDERAL SURFACE AND MINERAL HOLDINGS

COUNTY	BLM SURFACE	U. S. FOREST SERVICE	BUR. REC.	FISH AND WILDLIFE	PARK SERVICE	F.P.C.	DEPARTMENT DEFENSE	VETERANS ADM.	RESERVED MINERALS	TOTAL WITHDRAWALS
Campbell	236,066.76	157,094.04	2,579.88						2,125,459.73	2,528,236.65
Converse	144,186.19	247,657.55	208.60						1,216,057.15	1,093,094.69
Cook	153,312.47	107,283.74	12,367.51		1,755.21		986.49		371,239.01	266,517.74
Goshen	26,737.13		953.83						209,754.08	179,251.17
Johnson	512,051.30	325,701.03							1,167,555.51	952,487.28
Natrona	1,454,035.73	5,614.68	18,499.26	3,040.00					1,275,191.04	278,927.03
Niobrara	124,245.47	640.00							622,237.49	10,923.15
Platte	82,240.06	1,422.59	15,975.21						319,206.54	27,140.54
Sheridan	50,730.29	391,548.37	1,169.46	711.05			1,371.01	1,806.23	641,520.13	509,902.33
Weston	76,431.40	224,077.29							505,808.26	326,766.69
SEPA	2,860,036.80	1,461,039.29	51,753.75	3,751.05	1,755.21		2,357.50	1,806.23	8,454,028.94	6,173,247.27
State Totals	17,793,175.47	8,978,247.91	706,357.24	20,551.50		2,401.81	7,450.72	1,806.23		22,942,762.52

Source: BLM Estimates

J. Industrial Economic Structure

Based on the social and economic factors examined elsewhere in this document, this section will summarize relevant aspects of the overall SEP analysis and present findings here in summary form. For more detailed examination of these respective factors, the reader is directed to the appropriate section(s) of this profile report.

1. Earnings by Sector

As shown in Section B, income in the SEPA is derived principally from non-farm sources, notably mining, wholesale/retail trade, and government (see Exhibit I-J-1). Breakdown of earnings by export or import designations is not possible at this time because of insufficient data (no import/export base analysis has been done for the state), however, it can be estimated that for those industrial sectors which play a major role in the SEPA's economy -- government, mining and wholesale/retail -- a significant portion of earnings is derived from outside sources.

2. Export-Import Base

Clearly, Wyoming and Campbell County within the SEPA export coal and oil, as well as other mineral resources, from which are derived sizable revenues in the form of taxes. These revenues are directed to the areas in which the industries are located. There are also associated costs with this export activity based on the sizable population growth that has occurred and is reflected in such areas as housing, public services, and the cost of government. On balance, however, it appears that for those counties where direct mineral development activities are presently taking place (or likely to occur in the future) dollar benefits from taxes and general economic growth will be sufficient (at least) to allow increased expenditures by public officials to plan for any added growth and development. Where direct tax benefits do not occur, because no mining or industrial base exists, costs may still result as population locates there either as a spillover from those

primary areas of development nearby, or as a natural offshoot of the region's expansion. In these cases, the problems facing a community cannot be dealt with adequately at the local or county level. And an issue for BLM to consider is the effects of its mineral development decisions upon such areas in particular.

3. Major Manufacturing Firms

For a description of the industrial activities occurring within each county of the SEPA, the following Exhibit (I-J-2) is derived from Section C of this report which discusses employment. For these industries, as shown by the income breakdowns, mineral development and related activities are the strongest factor of economic base for the region. Wholesale/retail trade is a second area of activity, though one more centralized in Casper and to a lesser degree, Sheridan. For example, in Campbell County, of a total employment (1974) of over 6300 persons, fully 20 percent were engaged in mining activities, with a slightly lesser proportion working in each of government and trade sectors. The rest of the labor force was distributed throughout other economic sectors. As the following listing shows, all but one of the major industries in Campbell County are engaged in mineral development. Similar relationships are found in many of the SEPA counties. In both Casper and Sheridan, however, employment in the trade sector is greatest, exceeding 30 percent (1974).

4. Industry Multiplier Effect

Based on previous studies carried out in the SEPA and other areas[1], an estimated secondary employment multiplier can be derived and applied to the region's industry base. The total employment figure for an area experiencing development of the type being considered here, approximates 2.20 persons overall. Adjusting this figure to reflect seasonal variations in workforce, structured work shifts, and temporary workers on a project, a more representative figure of 1.70 is derived. This figure means that there will be a total of slightly less than two new jobs generated in an area experiencing

development typical of the type identified. The portion of this total employment attributable to secondary growth is, therefore, .70. For a given range of employment levels, this multiplier can be shown as providing major new opportunities for a region.

EXHIBIT I-J-2

Hypothetical Employment Effects of Energy-Development Projects

Primary Project	Employment Multiplier	New Employment
200 - 300	.70	140 - 210
500 -1000	.70	350 - 700
1000 -2000	.70	700 -1400

The income likely to be derived from these new jobs depends on a variety of factors centered around the local economy of an area where a project may locate and extending, in the case of the SEPA, to Casper where much of the support and service for a project or an industry would be located. Such factors as local commercial sector, housing market, transportation network, tax base, and level of public services all contribute to the relative demand for added goods and services which then generate new jobs. A community must be able to support not only the primary job, but also the secondary one. Income generation can be estimated in very broad terms.

Using the industry earnings figures shown in Exhibit I-J-3, an income multiplier of 0.55 for indirect earnings can be developed for the SEPA region.[2] The following breakdown would apply this multiplier to the major mineral industry sectors and related manufacturing activities in the District.

EXHIBIT I-J-3

Industry Commodity	Industry Earnings ($millions)	Indirect Earnings (x 0.55)($millions)	Total Earnings
Total Mining: Coal, Oil Gas, and other minerals	$80.59	$44.32	$124.91

Source: Harbridge House, Inc., earnings data from Section B of this SEP.

Of this total income figure of $124.9 million, it is estimated that the total income for the area dependent on this resource activity is greater due to the strong interrelationships between this sector (as reputed by the U.S. Department of Commerce) and others like construction, manufacturing, and services. However, a more comprehensive estimate is not possible at this time. These totals are provided as a general indication of the extent of secondary growth associated with the primary industry sector.

For mineral industry employment in the SEPA, there were over 6423 persons engaged in work in this sector in 1974, the data of the latest figures. This represents an increase of over 50 percent from 1970 figures for employment. Based on a total SEPA population (in 1975) of 136,650 persons, this mineral sector employment represents a rate of about five percent. The following exhibit (I-J-4) provides some estimates of relative industry mineral sector growth compared to overall SEPA population growth.

EXHIBIT I-J-4

Projected Mineral Development and

Population Growth within the SEPA

	1976	1980	1985	1990
SEPA Population Projections[1]	150,321	187,545	208,364	230,106
Mineral Resource[2] Employment	8,028	11,539	15,544	20,680
Percent of Population Dependent on Mineral Industry	5%	6%	8%	9%

[1] Based on population projections from Harbridge House, Inc., Casper District, SEP Section I-A.

[2] Based on mineral resource industry growth projections from Harbridge House, Inc., Casper District SEP, Section I-K, using as an average annual conservative growth rate applied to employment, a similar rate as experienced in population growth adjusted to reflect industry trends.

Source: Harbridge House, Inc., 1977.

It is suggested further from the SEP, that problems can arise from a community's overdependence upon a single industry base -- in this case minerals. It has been shown elsewhere in this report[3] that reliance on a single industry base in the local economy may prove to be beneficial in the short term, but costly over the long life of a community. In fact, Gillette, for example, is experiencing the conflicts of a strong tax base, but a still developing community economic and social structure not able to cope fully with its growth. Likewise, Sheridan, or even Casper,by comparison a thriving trade center in the SEPA, are not providing fully to consumers seeking greater variety of goods and services. Homes in these cities, as well as in other parts of the SEPA, are, however, selling at a premium. Such contradictions abound.

Many of these present-day occurrences are a result of the rapid development that has occurred in the region and which brought in new residents and families faster than they could be adequately planned for and supported. Yet, because of the support provided to the local financial base by industry, these communities can rely on mineral development to support many phases of public life. Schools, public services, and the general elements of lifestyle found in the SEPA are all closely linked to the industrial activities occurring there. To the extent that economic and social diversification can be achieved, many of the problems being faced today will be alleviated.

FOOTNOTES

1. Based on a recent study carried out by Harbridge House, Inc., for the Bureau of Reclamation for an energy development project in Utah (Socioeconomic Assessment of the Diamond Fork and Provo River Systems of the Bonneville Unit of the Central Utah Project, 1977, Salt Lake City, Utah), an overall employment multiplier of 2.20 was derived. By contrast the BLM Casper District reported in its Planning Area Analysis for northeastern sector of its region encompassing Campbell and Converse Counties, an income multiplier of 1.55. While these two figures are not strictly comparable, they do have some interrelation and can be interpreted together. Because of the differences in relative size of workforce for a given development (between 200 and 300 primary workers for mining; up to 2000 workers for construction of major power plants and processing/gasification plants), the figure derived in the Utah Study seems to be an applicable one in light of the fact that no reliable alternative data are available.

2. Based on Casper District Planning Area Analysis for Campbell and Converse Counties for all mineral commodities (excluding uranium).

3. Ibid.

EXHIBIT I-J-1

Earnings By Major Industrial Sectors (1974)

Economic Sector	Earnings in Millions $	Percent
Farm	$ 41,90	8%
Non-Farm	481.84	92%
Private	397.92	--
• Manufacturing	35.05	9%
• Mining	80.59	20%
• Construction	54.63	14%
• Wholesale/Retail	89.65	22%
• Transportation, Communications, Public Utilities	42.89	11%
• Services	56.10	14%
Government	83.22	--

[1] Some minor sectors were omitted from this listing so that the actual percentage for each sector among all sectors within the SEPA would be slightly less.

Source: Department of Commerce, Bureau of Economic Analysis, Local Area Personal Income 1969-1974 (Vol. 4: Western States), June, 1976.

K. Resource-Based Industry

1. Minerals

The resource-based industry in the SEPA reflects similar patterns as those for the overall economic-industrial structure described in Section J. Minerals development constitutes a major economic sector and one which has been steadily increasing. Of equal value has been livestock activities although in terms of overall development, livestock activity in the SEPA has not shown the same level of intensity as minerals development. The following breakdowns of resource-based industry indicate the relative importance of each within the SEPA and relative to the state.

Exhibit I-K-1 shows the recent past mineral development trends for the ten SEPA counties since 1973. As can be seen, for the major energy and metals minerals, oil and gas were the predominant source of production and revenues until about 1974-1975. In 1976, these commodities began to decline in production levels (although inflation kept their value up) while coal, and to a lesser extent, the metal minerals increased in both production and valuation. And, by 1980 while coal production is expected to increase threefold and metals mining double, oil and gas both will decline by 20 and 50 percent, respectively.

Production of construction materials -- crushed rock, aggregate, and sand and gravel -- is directly dependent upon the level of activity in the construction industry, a cyclical relationship at best. With the recent recessionary trends in the national economy (coupled with high inflation and interest rates) these materials have not been a strong sector of the economy. Their production has usually been of a secondary nature, sometimes related to other extractive operations. By and large, within the SEPA, this sector has been concentrated around the major urbanized areas, principally Casper, and to a lesser extent, Sheridan and Gillette.

With the development of energy-related industries in the state and the SEPA, particularly the expansion of existing and construction of new power generating facilities and water diversion and control projects, the rate of extraction of construction materials is expected to remain somewhat stable over the short term. But this activity will be concentrated in the areas near to development and will decline once the construction phase of development ends. Some secondary demand for construction materials will occur from general growth and development in the SEPA which will help to stabilize this industry somewhat.

For the SEPA, the significance of this is great. For example, in Campbell County, where the bulk of the current oil and gas development in the state and the SEPA is located, so too is this the location of major coal resources and, for the projected years, this shift in mineral resource-industry base will alter the economic and fiscal base of the county. While it cannot be said with certainty how this future shift will affect the local economy, it appears that overall, the area will benefit from the turnaround in minerals production. For while oil and gas may be declining by some modest amount, coal and metals will be increasing tremendously. In fact, it is anticipated by local officials in Campbell County-Gillette,[1] that by 1980-1990, the current major tax base share being borne byoil and gas developments will be supplanted by coal as the predominant mineral activity. Sheridan County will, to a lesser extent, also experience an upsurge in coal development. For these counties and for the SEPA as a whole, this growth of coal resources will shape much of the social and economic patterns that will occur.

The present market relationships for minerals within the SEPA are centered around the major production areas of Campbell and Converse Counties with Sheridan and Platte Counties supplying a lesser amount of certain mineral resources. Approximately half of the current production of coal in Campbell, Sheridan, and Converse Counties (which together account for over one-third of total Wyoming coal production in 1976 and all of the SEPA's

production) is used for generation of electric power plants located near the mine mouth.[2] The electricity generated is then sold in local and regional markets by Pacific Power and Light Co. and by Montana-Dakota Utilities, the major suppliers to the region. The remainder of coal produced is shipped out of the local area to power plants in Colorado and Indiana.

As future production of coal increases, a great percentage will continue to be sent to other regional or national locations for fueling of power plants; or if gasification becomes feasible, the coal can be processed near its source and the gas shipped to regional and national markets. Present contracts call for distribution to locations throughout the Intermountain West and Midwest.

The market for petroleum and natural gas supplies is comparable to that of coal. Major supplies are centered in Campbell, Natrona, and Converse Counties. Most of this resource product is shipped to markets outside of the region and nationally.

Uranium, found principally in Converse County, is mined and milled locally due to the great expense of transporting the ore. The resultant product (referred to as yellowcake) is then sent to national locations for further processing and marketing.

Construction materials found in the SEPA are produced principally for local consumption and, as described above, are not a major resource base for the area.

Based on present employment patterns in the SEPA (see Section C) and income levels (see Section B) discussed in the previous Section J, it is clear that the growth of coal mining together with the continued substantial oil and gas development will expand the SEPA's economic base and contribute to overall growth. As discussed previously, these activities will contribute, also, to greater pressures on localities in terms of their ability to manage and plan for this growth.

Because of the occurrence of these mineral resources below the surface of public lands (NRL and others), the Bureau often is directly involved in development of these resources through its leasing and planning management responsibilities. As discussed in this document, some of the issues involved in such leasing can extend beyond the boundaries of the BLM-managed lands to encompass local communities and the entire SEP area. While BLM must consider the reasonable requests of the industry representatives seeking to explore and extract these mineral resources in a timely and cost-effective manner, so, too, must the Bureau be sensitive to the issues of the respective communities affected by both short-term and more far-reaching implications of such mineral development activities. As discussed in Section J, above, a goal of the SEPA communities must be to diversify their economic base(s) beyond development of mineral resources alone to insure a long-term stability and improved social-economic makeup. Likewise, BLM can address the broader questions of economic stability and social organization for their region in order to assess the fullest possible range of opportunities and benefits, as well as likely costs.

2. Forest Products -- Timber[3]

Wyoming has four principal timbered areas statewide. These occur in the mountainous higher elevations of the state. The largest of these is in the northwestern part of the state outside of the SEPA boundary. The other areas, parts of which are included in the SEPA, are in the Big Horn Mountains in the north central part of the state, the Black Hills in the north eastern corner, and the Medicine Bow range near the south central part of the state. Exhibit I-K-2 maps the forest areas and types in Wyoming.

In total about ten million acres of land area in Wyoming or about 16% of the state is classified as forest land.[4] Of this total, about 3.2 million acres (32 percent) are classified as commercial forest land; the remaining 6.8 million acres are non-commercial.[5] Of the remaining non-commercial forest acreage there is included unproductive forest lands as well as productive forests reserved for parks or wilderness areas.

The largest forest holdings in Wyoming and in the SEPA are under federal control by the U.S. Forest Service. Over 8.6 million acres of National Forest lands are in Wyoming; 977,000 acres of these, or about 11% of the total, are located within SEPA counties (see Exhibit I-K-3).

The National Forest lands occur in three major areas within the SEPA: the Brigham National Forest with over 730,000 acres in Johnson and Sheridan Counties; the Black Hills National Forest with 168,000 acres in Crook and Weston Counties; and the Medicine Bow National Forest with 81,000 acres in Converse, Natrona and Platte Counties.

For the three major National Forests, significant portions of these lands are commercially worked. Johnson and Sheridan Counties accounted for about one-third each of the total commercial acreage in Brigham Forest, Crook and Weston Counties together make up the Black Hills National Forest, and Converse, Natrona and Platte Counties accounted for less than 8% of the Medicine Bow Forest. While no figures on commercial acreage by SEPA County are available,

the breakdowns by each national forest show that over 1.9 million acres of lands (or 22%) in these forests are for commercial use. In the case of the Black Hills National Forest entirely within Crook and Weston Counties, almost all of that land (93%) is commercial forest. The value of these commercial forest lands in the three national forests totalled $590,000 in 1976 with a harvest of 56,245 MBF.

Data on forest lands in Wyoming held by other federal agencies is incomplete. The only basis for comparison is found in a publication of the U.S. Forest Service, Resource Bulletin INT-2 (1963) entitled, The Forests of Wyoming. Based upon 1960 Census of Land and Water Areas this source breaks down the ownership of commercial forest land in Wyoming under federal control as follows:

Ownership	Acreage	Percent of Total
National Forest	3,364	87%
Other Federal:		
BLM	395	10%
Indian	124	3%
TOTAL	3,883	100%

As can be seen, in 1960 the Forest Service controlled most of the federal commercial forest lands in the state. While no further breakdowns of land by ownership, use or type are available, these figures provide some basis for comparative assessment. BLM forest lands and commercial forest activities are minimal.

Exhibit I-K-4 shows the breakdown of non-federal forest land by county within the SEPA. From this exhibit it can be seen that there is commercial forestry being carried out in the SEPA predominantly within Crook, Weston, Converse and Johnson Counties; and to a lesser degree in Sheridan, Natrona and Campbell Counties. Other counties within the SEPA have significant forest average, however, these are not being commercially worked.

While there are no consistent comparative figures linking federal and non-federal forest lands in the SEPA or the state, it is clear from the data

available that the principal SEPA counties with an established forest resource industry are Crook, Weston, Converse, Johnson and Sheridan Counties. Additionally, active sawmills in the SEPA in existence in 1974 are shown in Exhibit I-K-4. No further breakdowns of data on forest products and their commercial use are available.[6]

3. Livestock Forage

The national resource lands in the SEPA provide 342,229 AUMs which is seven percent of the total required livestock forage, out of a total livestock industry feed level of about 4.87 million AUMs.[7]

This amount of livestock forage produced on national resource lands is modest compared to the livestock industry overall. On an individual lessee basis, however, national resource land forage can be significant because it is available (at a probable cost savings) for grazing in lieu of private meadows and/or for hay feeding during the spring and early summer months. In most cases, each lessee has private native range which is also available for grazing during this same period. National resource land lease areas are relatively small and many are leased for convenience purposes. Because of the scattered ownership pattern, these tracts of national resource lands are usually leased to block up the total area of operation.

There are a total of over 2.86 million acres of land in NRL designation in the SEPA. For the Casper District, moreover, the related income earnings from livestock amount to $24.5 million based on overall agricultural industry figures.[8]

Because data was unavailable on a county basis to allow further breakdowns of this industry data, information summarizing the effects of NRL upon the SEPA-wide area is derived from a study done by BLM on the Natrona, Campbell, and Converse Counties area. This study concludes that for this study area (admittedly smaller than the entire SEPA, although encompassing a major portion of the industry and population activity there), NRL forage production and income effect by regional analysis is insignificant, as verified by the local significance analysis, and as shown in Exhibit I-K-2.

Exhibit I-K-[5] summarizes the data that is available from that previous study, as well as updated information, where possible, to reflect SEPA-wide conditions.

The indirect income effect by SEPA area as shown in this exhibit, is only 0.4% of the total community income (all industries) as derived from livestock grazing on national resource lands in the SEPA. Specific breakdowns for Campbell, Converse, and Natrona Counties, for which data are available, are shown for comparison.

In 1975 total SEPA area livestock income of $24,500,000 was approximately .4% of total area income for all industries which was $523,232,000. The indirect income effect of the total area livestock industry using a multiplier of 1.469, would be $2,519,335, with the sum of all industries adding to the total as shown.

4. Wildlife and Recreation

Wildlife habitat use, hunting, and general recreational use of the national resource lands in the SEPA are, by comparison to the major mineral development activity in the region, concluded to be insignificant to the economies of the region. The information available indicates that BLM supplies a small portion of the wildlife (hunting opportunities), and even less of general outdoor recreational use. These figures reflect the amounts of hunter/visitor day use and income and employment generated from national resource land use in Campbell and Converse Counties, specifically, and then generalized for the SEPA overall. The figures are disputable in that they are derived from the percent that national resource land is of the total land base in the planning area, as well as their further generalization to the SEPA overall. Nevertheless, the figures presented are indicators of significance and provide a basis for land use allocation decisions. The fragmented land ownership base, limited access, and availability of the majority of the BLM administered lands in the SEPA counties results in some national resource land being highly significant for wildlife habitat, and general recreational use.

(i) General Recreation

The recreation uses presented in Exhibit I-K-6 reflect 2.1 million participants in the SEPA (engaged in major recreational activities); of these total participants, 126,000 or about six percent, used national resource lands.[9]

(ii) Hunting

The hunting use presented in Exhibits I-K-7 through K-10 reflects 77,552 hunter days in the Campbell-Converse county planning area; 5,960 of these hunter days (eight percent of the total hunter use) were spent on national resource land. Because of the limitations of the data, a complete breakdown on these figures for all ten (10) counties in the SEPA was not possible so that these exhibits are presented as indications of trends within one segment of the broader SEPA region.

(iii) Access, Ownership, and Use

The following facts apply to the SEPA region overall:

- the national resource lands are scattered throughout the planning area with few parcels being large blocks.
- much of the scattered land lies within private holdings and is inaccessible for use by the public.
- many private landowners charge fees to hunt on their holdings or allow hunting to only a privileged few.
- control of access to national resource lands by private owners to isolated tracts of national resource lands may lead to concentrated use of the few accessible larger parcels of national resource lands.
- in practicality, because of the above reason, actual use of national resource land, even though less than ten percent in total land base, may well be significantly greater than the data presented above.

FOOTNOTES (Section K)

1. See Section H of this report.

2. 1975 Wyoming Mineral Yearbook, 1976. Mineral Division, State DEPAD, Cheyenne, Wyoming (Feb. 1976).

3. Breakdowns of forest land usage and ownership are, unfortunately, difficult to obtain. No single source is available which breaks down forest land type, use and ownership, and sources that are available appear outdated and/or inconsistent. For example, data from the U.S. Forest Service (Resource Bulletin INT-2, 1963) identifies 1960 Census data for land and water areas in the U.S., however, these figures differ from those obtained more recently from the Forest Service, yet the more recent data is incomplete. And little uniformity exists between federal and private forest lands data.

   In an attempt to provide as much information as possible, we have included selective figures from all the sources available, noting their date and applicability as necessary.

4. Wyoming Industrial Development Corporation, Economic Blueprint Component of Public Investment Plan (by County Seat), State DEPAD, 1975. Due to inconsistencies in data, the figures presented for federal and non-federal forest lands do not compare.

5. Ibid.

6. Telephone interviews with Mr. Jack Edwards, BLM Economist, Denver, Colorado BLM Office, 25 July 1977 and with Mr. J.E. Bennett, Director, Timber Management, U.S. Forest Service, Lakewood, Colorado, 25 July 1977.

7. Wyoming State Agricultural Statistics, 1976. Crop and Livestock Reporting Service, Cheyenne, Wyoming (1976).

8. Ibid.; and, BLM Casper District Office, Planning Area Analysis for Campbell, Converse and Natrona Counties, Casper, Wyoming, (no date).

9. Wyoming Recreation Commission, An Outdoor Recreation Plan, June, 1975, Cheyenne, Wyoming.

EXHIBIT I-K-1

TOTAL MINERAL DEVELOPMENT IN THE SEPA AND THE STATE

Mineral Substance	1973 Prod.	1973 $[2]	1974 Prod.	1974 $[2]	1975* Prod.	1975* $[2]	1976* Prod.	1976* $[2]	1980* Prod.	1980* $[2]	Projected Change 1975-1980
Coal (tons)	4.51	$ 16.1	7.25	$ 14.5	8.3	NA	13.5	$ 20.6	33.7	NA	300%
Metals (tons)[1]	1.59	7.8	1.54	7.6	1.5	NA	1.5	NA	3.3	NA	100%
Oil (BBls)	62.84	261.3	64.12	479.9	64.0	NA	61.4	475.9	50.2	NA	(20%)
Gas (MCF)	67.79	12.9	53.90	14.4	51.9	NA	47.0	22.3	29.1	NA	(40%)

NA = Not Available

* Projections assuming a conservative mineral yield.

1 Includes uranium and iron ore.

2 Millions of dollars.

Source: 1975 Wyoming Mineral Yearbook, Mineral Division, State DEPAD, Cheyenne, Wyoming, (February 1976); and 1976 Annual Report, State of Wyoming, Department of Revenue and Taxation. Ad Valorem Tax Division, Cheyenne, Wyoming.

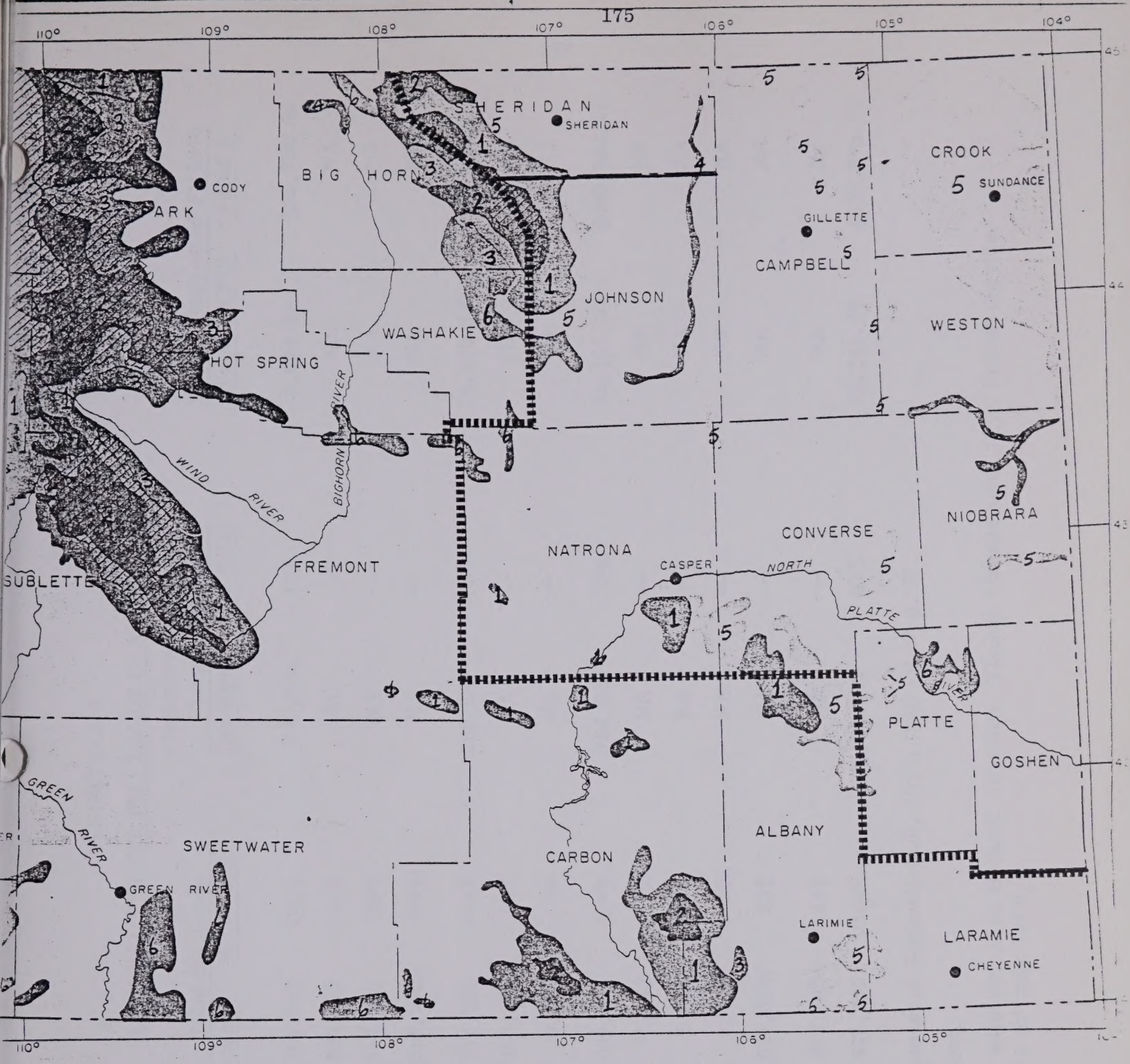

EXHIBIT I-K-2

MAJOR FOREST TYPES

WYOMING

1963

FOREST SURVEY – INTERMOUNTAIN FOREST AND RANGE EXPERIMENT STATION

U.S. DEPARTMENT OF AGRICULTURE – FOREST SERVICE

Scale 20 10 0 20 40 Miles

LEGEND

- 1 LODGEPOLE PINE
- 2 FIR-SPRUCE
- 3 DOUGLAS-FIR
- 4 HARDWOODS
- 5 PONDEROSA PINE
- 6 PINYON-JUNIPER
- 7 CHAPARRAL
- NON FOREST
- AREAS RESERVED FROM TIMBER CUTTING
- SEPA Boundry

EXHIBIT I-K-3

NATIONAL FOREST (NF) LANDS IN WYOMING, 1976

National Forest -- SEPA County	Total NF Lands[1]		Commercial Forest Land (Acres)[2]		Timber Harvested FY 1976	
	Acreage	% of Total	Acreage	% of Total	Volume (MFB)	Value $
Bighorn NF	1,107,342	100%	540,794	49%	9,644.28	$85,720.66
Johnson	326,875	30%	NA	--	NA	NA
Sheridan	394,562	36%	NA	--	NA	NA
(Others)	(385,905)	(34%)	NA	--	NA	NA
Black Hills NF	174,728	100%	162,527	93%	14,513.74	$98,026.69
Crook	168,229	96%	NA	--	NA	NA
Weston	6,499	4%	NA	--	NA	NA
Medicine Bow NF	1,093,314	100%	796,520	73%	28,467.60	$400,548.64
Converse	74,913	7%	NA	--	NA	NA
Natrona	5,615	1%	NA	--	NA	NA
Platte	1,142	1%	NA	--	NA	NA
(Others)	(1,011,644)	93%	NA	--	NA	NA
SEPA TOTAL	977,835	11%	NA	--	NA	NA
WYOMING TOTAL	8,678,905	100%	1,952,241	22%	56,245.47	$590,375.75

[1] National Forest System Areas as of September 30, 1976; 1380 (5400) p. 28.

[2] 1979 RPA Timber Assessment.

SOURCE: Personal interview with Mr. J.E. Bennett, Director, Timber Management, U.S. Forest Service, Lakewood, Colorado (25 July 1977).

EXHIBIT I-K-4

NON-FEDERAL FOREST LANDS IN WYOMING, 1976

County	Commercial Forest Acres			Non-Commercial Forest Acres			Total Forest Acres			Active Sawmills in Existence 1974[3]	
	State-owned[1] (a)	Private[3] (c-a)	Total[2] (c)	State-owned[1] (a)	Private[3] (c-a)	Total[2] (c)	State-owned[1] (a)	Private[3] (c-a)	Total[2] (c)	Number	MBF cut
Campbell	3,370	18,253	21,623	666	13,357	14,023	4,036	31,610	35,646	None	
Converse	6,443	57,304	63,747	8,363	53,097	61,460	14,806	110,401	125,207	2	1,000
Crook	17,390	309,226	326,616	3,689	9,718	13,407	21,079	318,944	340,023	3	15,000
Goshen	---	1,130	1,130	---	5,423	5,423	---	6,553	6,553	None	
Johnson	16,790	39,665	56,455	1,072	3,234	4,306	17,862	42,899	60,761	2	2,250
Natrona	7,585	15,034	22,619	4,618	4,770	9,388	12,203	19,804	32,007	NA	
Niobrara	2,474	5,438	7,912	21	9,466	9,487	2,495	14,904	17,399	None	
Platte	4,183	7,109	11,292	1,334	27,202	28,536	5,517	34,311	39,828	1	300
Sheridan	2,206	29,212	31,418	11	18,130	18,191	2,217	47,392	49,609	3	27,500
Weston	12,971	98,802	111,773	1,208	4,218	5,426	14,179	103,020	117,199	6	22,000
SEPA Totals										18	68,000
WYOMING	129,160	965,097	1,094,257	38,268	421,896	460,164	167,428	1,386,993	1,554,421	51	225,000

(1) Based on information provided by Mr. Herbert C. Cottrell, Assistant State Forester, Wyoming Commission of Public Lands and Farm Loans, Cheyenne, Wyoming (letter dated 13 July 1977).

(2) Ibid.

(3) Wyoming Industrial Development Corporation, Economic Blueprint Component of Public Investment Plan, State DEPAD, Cheyenne, Wyoming, 1975.

SOURCE: Harbridge House, Inc., 1977, based upon the above referenced sources.

EXHIBIT I-K-5

LIVESTOCK SUMMARY

1969 and 1975

COUNTY	LIVESTOCK INDUSTRY TOTAL AUM's	NRL AUM's	% BLM OF INDUSTRY TOTAL	TOTAL AREA LIVESTOCK INDUSTRY EARNINGS	INDUSTRY INCOME MULTIPLIER	LIVESTOCK INDUSTRY INCOME EFFECT OF AUM's PRODUCED ON NATIONAL RESOURCE LANDS	TOTAL INCOME ALL INDUSTRIES	% COMMUNITY DEPENDENCY ON LIVESTOCK INDUSTRY
Campbell	1,265,482	38,213	3.0	-	1.469	$ 348,726	1/	.2
Converse	1,156,507	30,215	2.6	-	1.469	302,229	1/	.2
Natrona	1,154,837	182,789	15.8	-	1.469	1,836,623	1/	.9
Area Total	3,576,826	251,217	7.0	($7,913,000)	1.469	813,694	$198,316,000	.4
SEPA TOTAL	4,872,710	342,229	7.0	($24,500,000)	1.469	2,519,335	$523,232,000	.4

1/ Data not available by county.

Source: Bureau of Land Management, Planning Area Analysis of Converse, Campbell, and Natrona Counties.

EXHIBIT I-K-6
ESTIMATED TOTAL RECREATION FOR SEPA
PARTICIPATION BY ACTIVITY, 1970-1990

Activity	Total Participation 1970	1990	Percent Change
Boating and Canoeing	234,277	399,525	71%
Camping	432,068	800,593	85%
Fishing	633,507	1,131,542	79%
Hiking	401,661	672,009	67%
Hunting	242,694	366,926	51%
Skiing (snow)	85,082	182,702	115%
Waterskiing	73,467	145,516	98%
TOTAL	2,102,756	5,801,569	

Breakdown of Activity Participation Rates, 1970

Boating and Canoeing	11%
Camping	21%
Fishing	30%
Hiking	19%
Hunting	12%
Skiing (snow)	4%
Waterskiing	3%

Source: Wyoming Recreation Commission, An Outdoor Recreation Plan, June, 1975, Cheyenne, Wyoming.

EXHIBIT I-K-7

ECONOMIC SIGNIFICANCE OF RECREATION ACTIVITIES
(Campbell-Converse Counties Planning Area Analysis)

RECREATION ACTIVITY	VISITOR DAYS			INCOME			EMPLOYMENT	
	TOTAL COUNTIES'	NATIONAL RESOURCE LAND	PERCENT	TOTAL COUNTIES'	NATIONAL RESOURCE LAND	PERCENT	TOTAL COUNTIES'	NATIONAL RESOURCE LAND
Hunting	77,552	5,960	8 %	2,939	237	4.0% 6/	118	9
Fishing	----------Insignificant----------							
General 1/ 4/		2/						
a. Boating-Canoeing	26,418	1,851	7.0%	106	7	7.0%		
b. Camping	57,307	3,694	6.4%	229	15	6.4%		
c. Hiking	49,217	2,963	6.0%	197	12	6.0%		
d. Picnicking	54,496	3,772	6.9%	218	15	6.9%		
e. Sightseeing 3/	80,108	4,868	6.0%	320	19	6.0%		
f. Snowmobiling 5/	14,862	983	6.6%	208	14	6.6%		
Sub-totals	282,408	18,131	6.4%	1,278	82	6/ 4.0%	3	7/ 1
TOTALS	359,960	24,091	7.0%	4,217	319	4.0% 6/	121	9

1/ Data from Wyo. SCORP, 1975.

2/ Data based upon fact that less than 10% of land base in area is NRL (not accurate).

3/ Does not include sightseeing from highway travel.

4/ General Visitor Days valued at $6/v.d.+ 1.5 to equal income.

5/ Valued at $21/v.d.

6/ Empl./Income Ratio for trade and services sector (wholesale/retail) $\frac{2117}{55185} = 4\%$

7/ Less than 1.

NOTE: These data are useful only in establishing trends.
Actual numbers used for official purposes should be obtained from tables contained in the URA's Step 3.

EXHIBIT I-K-8

ECONOMIC SIGNIFICANCE OF WILDLIFE ACTIVITIES
(Campbell-Converse Counties Planning Area Analysis)

WILDLIFE ACTIVITY (Type if significant)	VISITOR DAYS			INCOME			EMPLOYMENT	
	TOTAL COUNTIES'	NATIONAL RESOURCE LAND	PERCENT	TOTAL COUNTIES'	NATIONAL RESOURCE LAND	PERCENT	TOTAL COUNTIES'	NATIONAL RESOURCE LAND 3/
Hunting (total)								
a. Antelope	33,347	2,646	8.0%	1,667	132	8.0%		
b. Deer	36,443	2,928	8.0%	1,263	101	8.0%		
c. Elk	200	84	42.0% 1/	19*	8*	42.0%		
d. Other	7,562	302	4.0%	Insignificant due to new BLM % of total; $9,500/yr. insignificant to the economy.				
TOTALS	77,552	5,960	8.0%	2,939	237	4.0% 3/	118	9

* 2 years.

1/ Elk hunting opportunity every 2 years.

2/ Values: (Source - BLM Inst. Memo. 76-455)

Antelope	$ 75/H.D.
Deer	$ 52/H.D.
Elk	$147/H.D.
Upland Game	$ 6/H.D.

3/ Based on Employment/Income Ratio for W.T.+R.T.+Socio Sectors $\frac{2117}{55185} = 4\%$

EXHIBIT I-K-9

ECONOMIC SIGNIFICANCE OF RECREATION ACTIVITIES
(Campbell-Converse Counties Planning Area Analysis)

RECREATION ACTIVITY (Type if significant)	VISITOR DAYS CONVERSE COUNTY TOTAL COUNTIES'	NATIONAL RESOURCE LAND	PERCENT	VISITOR DAYS CAMPBELL COUNTY TOTAL COUNTIES'	NATIONAL RESOURCE LAND	PERCENT
Hunting (from Wildlife)	32,242	1,609	4.9%	47,512	4,557	9.5%
Fishing (from Wildlife)	-----No data available------			-----No data available------		
General*		**			**	
a. Boating-Canoeing	4,635	217		21,783	1,634	
b. Camping	21,558	1,013		35,749	2,681	
c. Hiking	26,017	1,223		23,200	1,740	
d. Picnicking	11,267	530		43,229	3,242	
e. Sightseeing	40,705	1,913		39,403	2,955	
f. Snowmobiling	4,670	219		10,192	764	
Sub-totals	108,852	5,115	3.6%	173,556	13,016	7.4%
TOTALS	141,094	6,724	4.7%	221,068	17,573	7.9%

* Data from Wyo. SCORP, 1975
** Data based upon fact that 4.7% of land base in county is NRL (no accurate projection).

EXHIBIT I-K-10

ECONOMIC SIGNIFICANCE OF RECREATION ACTIVITIES
(Campbell-Converse Counties Planning Area Analysis)

CONSUMPTIVE USE	VISITOR DAYS CONVERSE COUNTY			VISITOR DAYS CAMPBELL COUNTY			NOTES
	TOTAL COUNTIES'	NATIONAL RESOURCE LAND	PERCENT	TOTAL COUNTIES'	NATIONAL RESOURCE LAND	PERCENT	
Hunting (total):							Hunter days - BLM No. of animals BLM
a. Antelope	11,849	711	6.0%	22,117	2,212	10.0%	Antelope and Deer .81
b. Deer	14,326	716	5.0%	21,498	1,935	9.0%	Elk 1.40
c. Elk	6.067	182	3.0%	200	84	42.0%	
d. Other	-	-	-	-	-	-	Other (no population data)
Fishing (total):							Hunter da./ac. NRL Antelope and Deer .01
a. Warm water	----------No data----------			----------No data----------			Elk .003
b. Cold water	----------No data----------			----------No data----------			Other = Too small for significance.
TOTALS	32,242	1,609	5.0%	45,310	4,351	17.0%	

Hunter Day Values: Source - BLM IM 76-455, Encl. 5-2, Allotment Management Plan Economic Analysis

Antelope	$75/H.D.
Deer	$52/H.D.
Upland Game	$ 6/H.D.

Income = H.D.$ Value x Hunter Days ÷ 1.5 = Income

Employment related to Wildlife:

$$\frac{\text{Retail Trade Empl.} + \text{Services Empl. Income}}{\text{R.T.} + \text{Income Svcs.}} = \text{Coef.}$$

L. Significant Data Findings, Bureau Relationships and Key Interactions

The principal analysis issues regarding the Social-Economic Profile which emerged during the preparation of this document were related to the lack of uniform coverage and reporting procedures for information in many of the data categories examined. This aspect of the profile was due, in part, to the general data gaps which exist because of the rapid growth and development which has occurred in the state and within the SEPA since 1970 when the last census was taken. Thus, population, housing, income figures, and land use information has changed significantly. Moreover, information in many of the topics, for example land usage, is reported by different federal, state, regional, and/or local sources without any mechanism for consistency or comparison even though much overlap occurs. This results in often conflicting figures for such categories in land use as urban lands, vacant lands, municipal lands, and the like which had not been either uniformly defined or inventoried.

Still another problem arose from the lack of uniformity in carrying out socioeconomic analysis by the respective agencies in the region. As a result, the most timely and up-to-date information focused on those areas where growth issues have been strongest and where the support for such studies has been greatest -- Casper, Gillette, and Sheridan -- to the exclusion of the other seven SEPA counties. While not entirely unexpected, this data deficiency was nonetheless problematic in several of the categories examined. In spite of these general data gaps and deficiencies, identified in each topical section of the report profile, there was a wealth of information available to the analysts which yielded a picture of the SEPA region with particular focus on those areas and communities where concerns are the greatest.

In Gillette and Campbell County the issues raised were those attendant upon a growing community's desires to establish a stronger economic and social base in the midst of local economic and industrial growth related to oil and gas production and energy development, with coal development a growing

sector which is anticipated to expand significantly in the future. The availability of goods and services; the likely employment and income trends in the region; housing trends and public services; and the ability of the areas' economic base to diversify in order to sustain the rapid short-term growth and development over time are some of the problems which are continually being examined by state and local authorities.

In another instance, the concerns in Sheridan and Sheridan County focused on the inadequacies of the fiscal base at the county level. Unlike neighboring Campbell County, which benefits greatly from tax dollars generated by mineral development, Sheridan County bears much of the costs of such activity occurring outside its bounds without sharing these benefits. Since the principal mineral activity occurs (and will continue to occur) outside of the County's bounds (notably in Montana to the north) the tax revenues from direct mineral activities derived by Sheridan will be modest. Yet, because of its appeal as an attractive residential location offering recreational, public service and community benefits, Sheridan is experiencing growth as new residents from a much wider market area than might individually occur, locate there. Accommodating this current growth, as well as planning for anticipated future growth, is a chief concern of local officials.[1]

Casper and Natrona County enjoy perhaps the best position relative to this current and projected growth in the SEPA. As the largest and most established commercial and retail trade center, it has access to the best transportation network, it provides a growing economic base and industrial sector, it has a strong housing market, and it offers the greatest variety of living styles and cultural amenities. Yet, Casper also faces many of the same problems as its neighboring communities. Its provision of goods and services is, at best, limited with a result that consumers must often look outside of the SEPA, and in some cases outside of the state, for certain major purchases and needs; the economy, though more diversified than smaller communities, is still heavily dependent on mineral development and related activities; and, like its neighboring SEPA communities, Casper is for some things an expensive place to live.

For the Bureau of Land Management and the Casper District Office, these issues are not always directly related to management of National Resource Lands or mineral leasing activities. However, at some point, the economic and social implications of mineral development and its concurrent effects on communities and people will be felt by areas outside of the immediate activity location.

A key source for much of the most current data in the SEPA is with local planners and officials within respective counties and cities. This is particularly true of those communities who have experienced the greatest impacts from "boom" growth and also who have analyzed their present positions and future opportunities and options relative to the mineral development industries. State agencies also can provide some additional information useful to BLM planning and management responsibilities. A listing of the key agencies and individuals with information relating to the topics covered in this document is provided in an appendix to this report under separate cover. This document is a compilation of these and other available materials. It is not only a social-economic profile of the Casper District, but also is an attempt to identify some of the pressing issues felt in the SEPA and suggest areas for further analysis.

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